

GIFT

To support the mission of Lifting Up Westchester, I/We have made a provision for a gift as a part of my/our estate plans through a:

- | | |
|---|--|
| <input type="checkbox"/> Will or Trust | <input type="checkbox"/> Beneficiary Designation |
| <input type="checkbox"/> Retirement Account | <input type="checkbox"/> Life Insurance Policy |
| <input type="checkbox"/> Charitable Trust | <input type="checkbox"/> Other _____ |

My/our gift is a specific dollar or percentage (optional): \$ _____ % _____

PREFERENCE

I/we would like for our gift to be:

- Unrestricted – for maximum flexibility to meet future needs.
- Restricted – *please share your intentions so that we can ensure your gift has maximum impact, and consult your attorney so that your gift instructions can be recorded legally and accurately.*

Name recognition

- Yes, you may list my/our name(s) in connection with this gift.
- No, please do not publicly list my/our name(s).

MY INFORMATION

Name(s) _____

Address, City, State, Zip _____

Phone # or E-mail _____ Date _____

Signature(s) _____

Personal Representative /
Executor / or Fund Company:

Contact (address, phone,
E-mail):