



Dear Friend,

We recognize that many of our donors greatly value their privacy. For people who plan to support the Community Foundation serving Southwest Colorado through their estate, please note — by letting us know of your plans, we can show our gratitude and confirm that we are able to fulfill your gift with your stated intentions.

Please know that completing this form is non-binding — we understand that you may change your plans at any time. Please also know that all information you share with us is kept strictly confidential.

You may utilize the fillable form below to share your intentions. Please email the completed form to me, along with any other necessary gift documentation. Thank you in advance for your incredible generosity. We are honored that you are considering leaving a lasting legacy in Southwest Colorado through the Community Foundation.

In gratitude,

Briggen Wrinkle, Executive Director
director@swcommunityfoundation.org
970.375.5807 x 1

Return Form to:

Community Foundation serving Southwest Colorado
765 E. College Dr. #1
Durango, CO 81301

Planned Gift Notification- Confidential

CONFIDENTIAL PERSONAL INFORMATION

Name:

Spouse/Partner:

Address:

City:

State:

Zip:

Phone:

Email:

Date(s) of Birth:



CONFIDENTIAL GIFT INTENTION FORM

Please provide the following information and include a copy of the documentation or appropriate language from your will or trust, if available. Please complete all that apply.

I/We have included a bequest for SWCF in my/our will or living trust.

I/We have named SWCF as a beneficiary of an asset:

Retirement Plan

Life Insurance Policy

Bank, Investment, or Other Financial Account

Other:

I/We have named SWCF as a revocable or irrevocable (select one) beneficiary of a charitable remainder trust.

The anticipated value of my/our gift is/will be approximately \$_____ or _____% of my/our estate. *(If possible, please include a copy of the bequest language or other wording describing your planned gift.)*

Please provide a general description of the gift provision (such as: asset to be donated, if other than cash or securities, how gift is to be used, whether gift is to create an endowment, etc.):

Yes, I/We would like to be invited to special events through the Community Foundation's **Legacy Giving Circle**.

Yes, you may include me/us in listings of planned gift donors.

Please indicate how you would like your name(s) to appear in our **Legacy Giving Circle** listings. _____

No, please do not include me/us in listings.

Signature(s)

Date

Signature

Date

Empowering Your Passions