**Planned & Legacy Gifts**

Please take a moment to fill out this form:

Name\*: Click or tap here to enter text.

Email\*: Click or tap here to enter text.

Phone\*: Click or tap here to enter text.

Mailing Address: Click or tap here to enter text.

Please share as many details as you're comfortable with, including all applicable items and a rough estimate of each gift's current value. We understand these values may change.

|  |  |
| --- | --- |
| [ ]  Will: $Click or tap here to enter text. | [ ]  Insurance Policy: $Click or tap here to enter text. |
| [ ]  Revocable Living Trust: $Click or tap here to enter text. | [ ]  Real Estate: $ Click or tap here to enter text. |
| [ ]  Charitable Remainder Trust: $Click or tap here to enter text. | [ ]  Retirement Plan/IRA: $ Click or tap here to enter text. |
| [ ]  Other asset(s): $Click or tap here to enter text. |
| Is your gift contingent? [ ] Yes [ ]  No If yes, please explain: Click or tap here to enter text. *A contingent gift comes to View the Future only if the other named beneficiaries do not survive you.*  |

How would you like to be recognized for your gift?

[ ]  I/We would like to be listed, which may include listing my/our gift within a dollar range. Please list my/our name(s) as: Click or tap here to enter text.

[ ]  I/We prefer that my/our gift not be listed within a dollar range, but you may list my/our name(s). Please list my/our name(s) as: Click or tap here to enter text.

[ ]  I/We wish to remain anonymous for this gift.

[ ]  Please email or mail to us and someone will reach out to you to discuss more.

**View the Future**

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