

LEGACY FOR LIFE SOCIETY

PLANNED GIFT INTENTION FORM

HOUSTON
HUMANE
SOCIETY

I would like to support the future of animals in need by joining the **Legacy for Life Society**, a group of dedicated individuals who have included Houston Humane Society in their will or estate plans.

DONOR DETAILS

CONTACT NAME _____

SPOUSE NAME or N/A _____

ADDRESS _____

CITY _____ STATE _____ ZIP _____

PHONE # _____ EMAIL _____

BIRTHDAY ____ / ____ / ____ SPOUSE'S BIRTHDAY ____ / ____ / ____

PLANNED GIFT DETAILS

This is a **confidential record** that helps Houston Humane Society ensure your wishes will be carried out. Please use the correct legal language to arrange your gift. Provisions should be designated to:

- **Houston Humane Society**
- EIN: **74-1340341**

1. SIGNING DATE for the documentation establishing my planned gift ____ / ____ / ____

2. My planned gift provides for the following charitable contribution:

- ☐ \$ _____
- ☐ _____ % of _____

A credible estimate of the current planned gift value is \$ _____

3. My planned gift will be made in the following way:

- ☐ PROVISIONS IN MY WILL
- ☐ RETIREMENT PLAN ASSETS {beneficiary designation for 401(k), 403(b), or IRA}
- ☐ LIFE INSURANCE
- ☐ OTHER _____

4. Additional contacts:

FAMILY MEMBER or EXECUTOR NAME

ATTORNEY or ESTATE PLANNER NAME

PHONE #

PHONE #

EMAIL

EMAIL

5. Planned gift purpose (please check one):

- ☐ UNRESTRICTED AND CAN BE USED FOR PRIORITY NEEDS AND INITIATIVES
- ☐ RESTRICTED FOR THE PURPOSE OF _____

6. Recognition preference (please check one):

- ☐ I UNDERSTAND ANNOUNCING THIS PLANNED GIFT MAY MOTIVATE OTHERS TO GIVE AND AM WILLING TO BE PUBLICLY ACKNOWLEDGED AS A MEMBER OF THE SOCIETY
- ☐ I PREFER TO REMAIN ANONYMOUS

7. PLANNED GIFT DOCUMENTATION

Please include a copy of your planned gift document with this form for our records.

8. SIGNATURE

Please discuss your planned giving intentions with your professional advisor and seek legal counsel when needed. By signing this document, you understand that completion of this form is not intended to be legally binding, but notification of intent. Your planned gift documentation may make your commitment binding or irrevocable if you choose to do so.

If your intentions should change in the future, please notify Houston Humane Society.

SIGNATURE _____ DATE _____

Please return this filled out form by either:

- **EMAIL:** donations@houstonhumane.org
- **MAIL:** Houston Humane Society, P.O. Box 450528, Houston, TX 77245

We are **tremendously** grateful for your generosity and support of our work towards, ending cruelty, abuse and the overpopulation of animals while providing the highest quality of life to those brought to us for care.