

Legacy Gift Intention Form

Thank you for choosing to support the Big Brothers Big Sisters mission through a legacy gift. By sharing with us the information on this form, you are helping us to prepare for the future as well as better understand the impact you would like to have through your gift.

As a Legacy Society member, we will provide you with regular updates from the agency with a quarterly e-newsletter, a mailed annual report, and invitations to special agency events. All Legacy Society members have the option to remain anonymous, but we welcome the opportunity to engage with you as a committed member of the Big Brothers Big Sisters community.

If you have questions about this form, please contact Jessica Whitney at jwhitney@bbbsaz.org or (480) 236-6476.

Contact Information

Name:

Date of Birth:

Spouses Name:

Spouses Date of Birth:

Mailing Address

City, State, Zip Code

Phone:

Email:

Gift Information

I have the intention of making the following type of planned gift...

- Bequest
 - Stock or property
 - Residuary bequest
- Charitable gift annuity
- Charitable remainder annuity trust
- Charitable remainder Unitrust
- Deferred Charitable Gift Annuity
- IRA or Retirement plan beneficiary
- Gift or property
- Charitable Lead Trust
- Life Insurance Policy

Please indicate the approximate current market value of the planned gift named above:

This gift is...

- Unrestricted
- Restricted as follows:

I am choosing to support BBBSAZ in this way because...

Acknowledgment & Communications

- I am comfortable having my gift publicly acknowledged and would like to receive updates and communications from BBBSAZ.
- I would like my gift to be recorded as anonymous publicly but would still like to receive updates and communications from BBBSAZ.
- I would like my gift to be recorded as anonymous publicly and prefer not to receive updates and communications from BBBSAZ.

If comfortable with public acknowledgment of your gift, please provide the name or names you would like used for recognition purposes: