



Estate Plan Intention Form

I want to support ABANA by including the organization in my estate plan as follows:

Section 1: Donor Information

NAME _____

ADDRESS _____ BIRTHDATE _____

STREET _____

CITY _____ STATE _____ ZIP _____

EMAIL _____ PHONE _____

Section 2: Type of estate commitment

Gift type:

- ☐ Will or Revocable Trust provision
- ☐ Charitable Remainder Trust
- ☐ IRA or Retirement Plan beneficiary
- ☐ Life Insurance beneficiary

ABANA will receive this gift:

- ☐ Upon my death
- ☐ Upon the death of my surviving spouse/partner
- ☐ Other _____

My gift is stated as:

- ☐ A specific dollar amount: \$ _____
- ☐ A percentage of estate/account: _____ %. The estimated current value of this percentage is: \$ _____
- ☐ Other (i.e. gifts of tangible personal property) _____

Section 3: Supporting documents

I have attached:

- ☐ A copy of the will or trust provision pertaining to ABANA
- ☐ A copy of the retirement account/insurance beneficiary designation form and summary page from a recent statement
- ☐ A letter from my attorney, executor, or trustee
- ☐ Other

Section 4: Gift designation

I would like my gift to support:

- ☐ ABANA's greatest needs (unrestricted)
- ☐ Other: _____
- ☐ Please contact me to discuss how my gift could be used.

Section 5: Donor and gift recognition

I ☐ do ☐ do not want to make this gift anonymously. Legacy gifts may be recognized online via our website, social media, and e-newsletters and/or in print in our magazines.

Anonymous donors will simply be listed as "Anonymous".

Section 6: estate contact information

Who would you like ABANA to contact upon your death to facilitate the distribution of your gift?

Executor Trustee IRA Custodian/Plan administrator Family Member Other _____

NAME _____

BUSINESS _____

ADDRESS _____

STREET CITY STATE ZIP CODE

EMAIL _____ PHONE _____

Would you like to share your ABANA story? If you'd like to tell us what inspired your gift, we'd love to know!

Donor signature _____ **Date** _____

ABANA understands that your plans or financial circumstances may change and the organization does not make financial commitments in anticipation of any future estate gifts. This form is not intended to be a legally binding pledge.

All information you provide will remain confidential.

ABANA Tax ID: 58-1270027

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