



## Jefferson Center Legacy Society Notification Form

- ☐ I have included a bequest to Jefferson Center in my will or living trust
- ☐ I have named Jefferson Center as a beneficiary of one of the following:
  - ☐ An outside trust arrangement
  - ☐ A retirement account
  - ☐ A life insurance policy
  - ☐ Other

**Please provide the following information:**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State Zip: \_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

***I give permission to Jefferson Center to list me/us as members of the Jefferson Society Legacy Society.***

\_\_\_\_\_  
**Name(s) as they should appear in donor listings**

\_\_\_\_\_ **This gift intention is anonymous.**

\_\_\_\_\_ **is my estimate of the current value of my planned gift.** (Please note this information is not required to be recognized as a member of the Legacy Society. Should you choose to provide this information, the amount will remain confidential and will not be included in public reports.)

- ☐ I am interested in learning more about Jefferson Center's Legacy Society and how my planned gift can impact future generations.
- ☐ I am interested in a naming opportunity for my legacy gift and would like more information.

\_\_\_\_\_  
**Signature**

\_\_\_\_\_  
**Date**