

## Legacy Intention Form

I/we have made the following provision for Providence General Foundation in the following way(s):

**Will or Trust**

Please provide copies of the following pages from your will: The front page with your name, back signature page, and the page listing the provision to Providence. Please block out any additional information you wish to keep confidential.

The provision is a:  Set dollar amount  Residual  % of assets  Other \_\_\_\_\_

The provision is:  Revocable  Irrevocable  Contingent

**Life Insurance**

Providence is the:  Beneficiary  Owner/Beneficiary

**Retirement Plan Beneficiary** (please provide us with the name of your plan administrator and your account number)

**Charitable Gift Annuity**

**Charitable Remainder or Lead Trust**

**Other Planned Gift** \_\_\_\_\_

The approximate value of the above gift is \$ \_\_\_\_\_

Please direct the above gift to the following fund:  The area of greatest need at the time the gift is realized  
 A specific fund or program (please contact me)

I/we would like to be in the Legacy Society  I/we would like to opt out of Legacy Society Membership

Name \_\_\_\_\_ Spouse's Name \_\_\_\_\_

Date of Birth \_\_\_\_\_ Spouse's Date of Birth \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_ Mobile \_\_\_\_\_

Email \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

How would you like your name listed in recognition: \_\_\_\_\_

I/we wish to remain anonymous during our lifetime  I/we would like to remain anonymous in perpetuity

**Thank you for supporting the mission of Providence. Please send completed forms to the following address:**

Providence General Foundation • 916 Pacific Avenue, Everett WA 98201 • (425) 258-7500 • [PlannedGiving@Providence.org](mailto:PlannedGiving@Providence.org)

*This is not a legal document. It serves as a way for us to understand your intentions and recognize you for generously including Providence in your legacy planning. Please contact the Foundation if your intentions change or the value of your gift significantly increases or decreases.*