

Donor Intent Form

Donor's Personal information	
Name of donor 1:	Click here to enter text.
Legal name if different:	Click here to enter text.
Name that should be used in print recognition:	Click here to enter text.
Donor date of birth (MM/DD/YY):	Click here to enter text.
If the donor prefers not to provide a birth date, enter approximate age	Click here to enter text.
Name of spouse:	Click here to enter text.
Name(s) of children/grandchildren:	Click here to enter text.
Name of donor 2:	Click here to enter text.
Legal name if different:	Click here to enter text.
Donor date of birth (MM/DD/YY):	Click here to enter text.
If the donor prefers not to provide a birth date, enter approximate age	Click here to enter text.
Permanent address Street:	Click here to enter text.
City, State, Zip Code	Click here to enter text.
Home phone:	Click here to enter text.
Business phone:	Click here to enter text.
Mobile phone:	Click here to enter text.
Donor's Affiliation. Check all that apply:	Choose an item.
Board member	Choose an item.
Board officer	Choose an item.
Employee	Choose an item.
Current Donor	Choose an item.
Volunteer	Choose an item.
Multi-generational user, donor or family/friends served by the organization	Choose an item.
Other (please describe)	Click here to enter text.

Attorney and/or Financial Advisor:	
Name:	Click here to enter text.
Company:	Click here to enter text.
Phone:	Click here to enter text.
Name:	Click here to enter text.
Company:	Click here to enter text.
Phone:	Click here to enter text.
Type of Gift:	
Describe type and amount of gift:	

Recognition (check all that apply):	
Donor wishes to remain anonymous.	
Donor agrees to be recognized for a gift of this type such as advertisements, print materials, and news releases.	
Donor wishes to be listed as a legacy society member and receive all the benefits (annual special event, donor listing, etc.)	
Donor wishes to remain involved in the organization in the following ways:	Click here to enter text.
Donor's wishes to receive ongoing communications with us such as all regular mailings, invitations to events, etc.	Click here to enter text.
For donor: Tell us what you would like future generations to know about you and why you have chosen to give this gift. Please provide more details about your relationship to our organization so we can inform future generations about you and why our organization is important to you.	Click here to enter text.
Are there any other organizations that will receive an estate gift from the donor's estate?	Choose an item.
If yes, Number of other organizations	Click here to enter text.
If yes, what are the other organizations?	Click here to enter text.

Restrictions on gift (check all that apply):	
There are no restrictions on this gift, it is for general purposes or to be determined by the organization when gift matures.	
Gift to a designated fund or specific program.	Describe: Click here to enter text.
Gift to be added to the principal of the existing Endowment Fund.	
Gift for the principal of a new endowment fund named: For the purpose of:	Click here to enter text.
Memorial or "in Honor of" designation:	Click here to enter text.
Anonymous gift.	
Other (please describe):	Click here to enter text.

How did the Donor hear about the organization? (check all that apply):	
Organization's published materials: newsletter, brochure, etc.	Choose an item.
Web site:	Choose an item.
From personal meeting with organization.	Choose an item.
Speaker at a financial planning seminar.	Choose an item.
Another donor.	Choose an item.
General knowledge/already knew/my own idea.	Choose an item.
Event.	Choose an item.
Friend or family.	Choose an item.
Legal or financial advisor.	Choose an item.

Donor's signature

Date

Organization Representative signature

Date

Please fax completed form to:
Email to:

This form will become part of the permanent, confidential donor record, to ensure that we are able to honor our donors' wishes and recognize their contributions to our organization for generations to come. It will also be returned to our organization when the gift is finalized. Additional copies are available on the web site under resources, or by contacting:

