

REVOCABLE GIFT FORM

As evidence of my/our desire to provide a legacy of support to March of Dimes, I/we hereby inform you that I/we have made a provision for March of Dimes in my/our estate plan(s). I/we understand that this commitment is revocable and can be modified at any time.

CONTACT INFO

Name(s): _____

Address: _____

Email: _____ Telephone: () _____

DESCRIPTION OF GIFT (TYPE/VALUE):

Bequest through will or revocable living trust

Specific dollar amount: \$ _____

Specific asset: \$ _____

Percentage of overall estate: _____% (approximate \$ value)

Percentage of residual estate: _____% (approximate \$ value)

IRA/retirement plan beneficiary designation: \$ _____ or _____% (approximate \$ value)

Life insurance beneficiary designation: \$ _____ or _____% (approximate \$ value)

Other type of gift (please describe): _____

RECOGNITION

I/we accept membership into the Roosevelt Society Legacy Circle (recognizes donors who've included March of Dimes in their estate plans).

Please include my/our name(s) in your list of Roosevelt Society Legacy Circle members.

Please do not list my/our names(s) in your list of Roosevelt Society Legacy Circle members.

DOCUMENTATION PROVIDED (PLEASE SELECT ONE):

This form serves as documentation for my/our commitment.

Copy of relevant estate documents or beneficiary designation form.

I/we understand that by stating an amount, my/our estate is not legally bound by this statement and I/we may modify or revoke this expectancy at any time at my/our sole discretion.

Donor signature: _____ Date: _____

Donor signature: _____ Date: _____