Friends of the WDAC Planned or Legacy Giving

Friends of the WDAC is part of Be Your Best, a 501(c)3 non-profit (Tax Number 88-2119092), enabling tax-deductible donations to the extent allowed by law. If you have specific instructions for how your gift should be used, please include this information below. Otherwise, funds / proceeds will be used to support our mission and objectives.

Please consult with your attorney or financial advisor for specific counsel on making a planned or legacy gift. Be Your Best and Friends of the WDAC cannot provide legal, financial planning, tax, or real estate advice.

Please return this completed form to Friends of the WDAC, P.O. Box 51, Cottage Grove, OR 97424

First Name: ______________________ Middle Initial: ____ Last Name ______________________

Mailing / Street Address:____

City / Town: ______________________________ State: ______ Zip: __________

Email: ____

Day Phone:__________________ Cell Phone: ________________ May we text you? ☐ No ☐ Yes

Please indicate what type of legacy / planned gift you are setting up:

☐ Will bequest ☐ Trust beneficiary ☐ Insurance policy beneficiary ☐ Financial account beneficiary

☐ Stock bequest ☐ Bond bequest ☐ Property / non-money bequest ☐ Retirement account beneficiary

Please describe your gift

A. **Gift description** *(will or trust bequest, beneficiary arrangement for a bank/credit union account, 401(K) or other retirement account, real estate or other property asset, stocks, bonds, etc.):* ______________________________

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B. **Gift amount or value** *(dollar amount, percentage of account balance, market value, etc.)*: $________________

C. **Institution / Location** *(where money or asset paperwork is kept – law office, bank, credit union, trust, insurance company, stock brokerage, real estate brokerage, etc.):* ______________________________

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D. **Contact** *(executor, lawyer, trustee, broker, etc.):*______________________________

E. **Account Number and Type** *(if applicable):*______________________________

F. **When is it payable or available?** *(upon death, after probate, immediate, other):*______________________

G. **Specific instructions for donation use** *(if you wish, specify a project, program or other cost):* ______________

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