



SAINT FRANCIS  
SERVICE DOGS



# BEQUEST NOTIFICATION FORM

Thank you for planning to support the future of Saint Francis Service Dogs! Please check any that apply. We realize that many people prefer not to reveal such personal information. Feel free to tell us only what you are comfortable sharing. You can rest assured that your information is kept confidential.

CHECK AS MANY AS DESIRED

- I(We) have included a bequest for Saint Francis Service Dogs in my/our Will or Living Trust.
- A life insurance policy, in which the Saint Francis Service Dogs is named as beneficiary or owner and beneficiary.
- Retirement assets, in which the Saint Francis Service Dogs is named as a beneficiary.
- A trust agreement, with income reserved for the donor, spouse, or other income Beneficiary.
- Other (please specify) \_\_\_\_\_  
\_\_\_\_\_

*Optional:* The estimated value of my (our) gift is \$ \_\_\_\_\_

- Irrevocable\*       Revocable\*\*      (See page 3 for details)

## Purpose

**It is my wish that the gift be used:**

We respectfully note that unrestricted funds allow flexibility to address future need in perpetuity

- At Saint Francis Service Dogs discretion, to create the greatest impact in helping people with disabilities better experience the world through partnership with a professionally trained service dog.
- For the following existing fund(s) or purpose: \_\_\_\_\_  
\_\_\_\_\_
- To create the following fund (please provide fund name and purpose): \_\_\_\_\_  
\_\_\_\_\_

**Special circumstances of my gift include:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

I would like to work with Saint Francis Service Dogs to create a memorandum of understanding that details the purpose of my gift.

- Yes       No



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**Recognition\*\*\***

**Saint Francis Service Dogs appreciates the opportunity to acknowledge your commitment by publicly recognizing your contribution. If you prefer to remain anonymous, however, we will respect your wishes.**

- I (We) permit Saint Francis Service Dogs to use my/our name(s) in printed lists of planned gifts, which may appear in Saint Francis Service Dog's annual report, newsletter, web site and/or other publications.
- I (We) prefer to remain anonymous during my/our lifetime(s). You may recognize my/our gift after you receive it.
- I (We) prefer to remain anonymous during and after my/our lifetime(s).

DONOR SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_

PRINTED NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP CODE: \_\_\_\_\_

PHONE: (H) \_\_\_\_\_ (W) \_\_\_\_\_ (C) \_\_\_\_\_

EMAIL: \_\_\_\_\_

DATE OF BIRTH: \_\_\_\_\_

SPOUSE'S SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_

PRINTED NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP CODE: \_\_\_\_\_

PHONE: (H) \_\_\_\_\_ (W) \_\_\_\_\_ (C) \_\_\_\_\_

EMAIL: \_\_\_\_\_

DATE OF BIRTH: \_\_\_\_\_

**Thank you** for your commitment to Saint Francis Service Dogs and your investment in our future. If you have any questions, please contact the Saint Francis Service Dogs: **540-342-3647 Ext. 402**      **[youell@saintfrancisdogs.org](mailto:youell@saintfrancisdogs.org)**

\*\*\*Note for couples: We are happy to list you either separately or as a couple, depending on your preference. If you would like to be recognized as a couple, please complete this form accordingly. If you are making separate planned gifts and prefer to be listed individually in all documents and/or publications, please submit separate forms, one in each name.



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### **\*Irrevocable bequest intentions (also known as “life pledges”)**

In accordance with Association of Fundraising Professional standards, Saint Francis Service Dogs may recognize and count irrevocable pledges where donors have included Saint Francis Service Dogs in their estate plans, provided that such donors (1) are age 70 or older at the time of the gift, (2) sign a written pledge agreement that makes their commitment legally binding and irrevocable, and (3) own sufficient assets to satisfy the amount committed, as best as Saint Francis Service Dogs can ascertain. These gifts will be entered into gift accounting records as a pledge. Although Saint Francis Service Dogs may provide an acknowledgment of the pledge for recognition purposes, per IRS regulations Saint Francis Service Dogs cannot provide any gift receipt to such donors until the pledge is satisfied.

### **\*\*Revocable bequest intentions**

Saint Francis Service Dogs welcomes notification by donors that they have included Saint Francis Service Dogs in their wills or estate plans, records this information in the Development database, and honors their generous intentions with an invitation to membership in the Legacy Society. However, Saint Francis Service Dogs does not book or count revocable future gifts or bequests, and per IRS regulations, Saint Francis Service Dogs cannot provide any gift receipt to donors until the gifts are realized.