



planned giving intention form

Thank you for sharing your intention to support the work of Arbor Circle with a planned gift. Please note, all information provided on this form is strictly confidential and will be used for internal planning purposes only. Before moving forward with a gift, Arbor Circle encourages you to discuss your planned giving intentions with your financial, tax or legal advisor.

To demonstrate my/our commitment to Arbor Circle's mission to transform the lives of children, adults and families, I/we have made charitable provisions for Arbor Circle in my/our estate plans.

Name(s): _____

Birthdate(s): _____

Address: _____

Home phone: _____ Mobile phone: _____

Email: _____

Please indicate your type(s) of planned gift below. *Optional: Consider providing information noted in italics.*

*Please note page 2 regarding the non-binding nature of completing this form.

- Bequest in my/our will (*percent / dollar amount*)
- Endowment or Donor Advised Fund (*name of provider*)
- Family Foundation Beneficiary
- Life Insurance Plan Beneficiary (*primary / contingent*)
- Retirement Plan Beneficiary (*primary / contingent*)
- Trust (*percent / dollar amount*)
- Other (*real estate, securities, or other type of gift*)

Estimated value of your planned gift: _____

Any additional details you wish to share: _____

Name and Phone Number of Attorney or Financial Advisor (optional): _____



Organizational Information

- Legal name: Arbor Circle Corporation
- Address: 1115 Ball Ave NE, Grand Rapids MI 49505
- Tax ID #: 38-3263853

Recognition for your planned gift includes inclusion in our annual Impact Report. Please note your name(s) as you wish them to appear, or let us know if you prefer to make your planned gift anonymously.

Name(s): _____

_____ I/we prefer to make this planned gift anonymously

Signature _____ Date _____

Please return this completed form and address any questions to:

Taylor Greenfield
Director of Development
Arbor Circle
1115 Ball Ave NE
Grand Rapids, MI 49505
tgreenfield@arborcircle.org
616.745.6325

**Completion of this form is a notice of intent only and not legally binding. Any details shared on this form about future gifts will remain confidential. Arbor Circle is a tax-exempt nonprofit organization recognized by section 501(c)(3) of the Internal Revenue Code. Tax ID # 38-3263853. Contributions are deductible as allowed by law. Planned gifts will be used at the discretion of the organization; unless your planned gift is specifically restricted, Arbor Circle's executive leadership team and the Arbor Circle Board will determine the best use of your gift.*