



STATEMENT: This statement is an expression of my intent to provide for the future of Steep Rock Association (“Steep Rock”) through a planned or estate gift. The provision(s) made include the following:

- An outright bequest upon the passing of the donor, or the passing of the donor and spouse.
- A life insurance policy in which Steep Rock is named as beneficiary or owner and beneficiary.
- Retirement assets, in which Steep Rock Association 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 \$ _____

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

- Where the need is greatest
- Other designation (please specify): _____

RECOGNITION: Steep Rock appreciates the opportunity to acknowledge your commitment to the community by publicly recognizing your contribution. If you prefer to remain anonymous, however, we will respect your wishes.

- I (we) permit Steep Rock to use my/our name(s) in printed lists of planned gifts/Legacy Society members, which may appear on our 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).
- I (we) would like to dedicate this gift in honor or in memory of someone special. You may use the honoree’s name and my/our names in printed and digital lists of planned gifts/Legacy Society members. Please list the honoree’s name as follows:

Donor’s Signature: _____ Date: _____

Spouse’s Signature *(if joint gift)* _____ Date _____

Printed Name _____ Date of Birth _____

Address _____

City, State, Zip Code: _____

Phone _____ e-mail _____