

Planned Giving Form

I/We have included a gift for The New Day Foundation for Families in my/our will, revocable trust, retirement plan, other financial instrument, or other estate plan. With this form, I/we are informing The New Day Foundation for Families of my/our intention to provide for the future of The New Day Foundation for Families. In addition, with this form I am/we are joining the Petoskey Stone Circle.

DONOR INFORMATION

Donor Name(s) _____

Address: _____

City: _____ State: _____ Zip Code: _____

Preferred Phone: _____ Preferred Email: _____

I/We wish to be listed in the Petoskey Stone Circle in all public acknowledgements as follows:

I/We wish to remain anonymous.

TYPE OF PLANNED GIFT

Simple Bequests

- Bequest through will or trust
- Life insurance policy beneficiary
- Retirement plan/IRA beneficiary
- Annuity beneficiary

Other Gifts

- Charitable remainder trust
- Charitable lead trust
- Other trust
- Insurance policy

Other details I/we wish to share: _____

Percentage _____ Dollar amount _____

PURPOSE OF PLANNED GIFT

- The gift is unrestricted to provide maximum flexibility for The New Day Foundation for Families.
- I/We have a specific purpose in mind _____
- A gift agreement: has been created. has not been created.
- A copy of the estate plan document(s): is attached. is not attached.

SIGNATURES

Completion of this form is a notification of intent only and allows me/us to join the Petoskey Stone Circle. It is not intended to be legally binding.

Signature: _____ Date: _____

Signature: _____ Date: _____