

# Opportunity Council

## Bequest Form



~ Confidential ~

Thank you for including Opportunity Council in your estate planning. Your commitment helps ensure that Opportunity Council will be able to meet the needs of people living on low incomes in Northwest Washington for generations to come. Please complete this form so that we have a record of your intended gift. Thank you!

Name(s): \_\_\_\_\_

- You may print my/our name(s) in Opportunity Council Legacy Society Listings
- Please do not include me/us in Opportunity Council Legacy Society Listings

Address: \_\_\_\_\_

Email: \_\_\_\_\_

Phone: (\_\_\_\_\_) \_\_\_\_\_ Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_

### Type of Provision

I have made provision for Opportunity Council in my estate planning as follows:

- Outright Restricted Bequest
- Outright Restricted Bequest  
Restricted to: \_\_\_\_\_
- Provision in the will of survivor of my spouse and myself  
Spouse's Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_
- Life Insurance Policy
- Trust under my will with Opportunity Council as remainder beneficiary

Please list names of income beneficiaries:

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Other Provision (please describe):

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**Attorney's Name:** \_\_\_\_\_

**Firm Name:** \_\_\_\_\_

*Your attorney and legal firm will not be contacted without your permission.*

Opportunity Council welcomes letters of copies of those sections of your will which further describe the nature of the above provision(s). We are grateful of being informed by you or your attorney of changes in your estate plans affecting the above provision(s). Thank you for entrusting us with your legacy of building bright futures and healthy communities for generations to come.

Signature: \_\_\_\_\_ Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

<p>Please print, complete, sign &amp; mail to:</p> <p>Opportunity Council Development Department  attn: Katie Rose, Fund Development Manager  PO Box 2134  Bellingham, WA 98227-2134</p> <p><i>The information provided here is for Opportunity Council records only and is considered strictly confidential.</i></p>
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