

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 Unrestricted 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:

Other Provision (please describe):

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: ____/____/____

Please print, complete, sign & mail to:
Opportunity Council Development Department
attn: Katie Rose, Fund Development Manager
PO Box 2134
Bellingham, WA 98227-2134

The information provided here is for Opportunity Council records only and is considered strictly confidential.