



PLANNED GIVING INTENTION

SunServe's Legacy Society is a community of thoughtful supporters who are leaving a legacy of financial support for LGBTQ social services in South Florida.

I/we would like to *create a legacy of supporting the LGBTQ community* and have included SunServe, Inc. in my/our estate plans.

Name(s): _____

Address: _____

Email: _____ DOB: / / Phone: _____

- Please recognize me/us in SunServe's Legacy Society as:

- I/we wish to remain anonymous.

Please indicate your planned gift: Bequest Life Insurance Policy Beneficiary

Retirement Plan Beneficiary Charitable Remainder Trust I/We will create (or have already created) an endowment with Our Fund or another entity for SunServe in my/our estate plans

Other _____

This gift will be:

- A specific amount: \$ _____ A gift of a specific asset _____
- A percentage of the residuary of my estate, trust or retirement plan, _____ percent

Please add any details you wish to share: _____

All information provided will be kept in the strictest confidence and will be used for internal planning purposes only. We understand that you may need to use estimates rather than exact figures.

Purpose of the planned gift to SunServe, Inc.

- Unrestricted gift to provide maximum flexibility for SunServe to use for greatest need.
- For a specific purpose _____

Signature: _____ Date: _____

PLEASE RETURN FORM TO: Terry Dyer, Director of Development
SunServe, 2312 Wilton Drive, Wilton Manors, FL 33305
Phone: 954.764.5150 ext 101 Fax: 954.764.5143 Email: tdyer@sunserve.org

Completion of this form is not intended to be legally binding, but notification of intent. Please discuss your planned giving intentions with your professional financial advisor and your family. SunServe is a tax-exempt nonprofit organization recognized by section 501(c)(3) of the Internal Revenue Code. Tax ID #01-0582371. Contributions are deductible as allowed by law.