

# CHARITABLE BEQUEST INTENTION FORM



## Estate Plan

I/we have included Hesed House in my/our estate plan. Please attach a copy of the document or relevant page (s) of your gift. All such information will be kept confidential.

**Provision in will or living trust**

Specific: \_\_\_\_\_  Percentage: \_\_\_\_\_  Residual: \_\_\_\_\_

**Beneficiary designation of**

Life insurance policy: \_\_\_\_\_

IRA or other retirement plan: \_\_\_\_\_

Charitable remainder trust: \_\_\_\_\_

Other: \_\_\_\_\_

**Estimated value of the bequest/gift:** \_\_\_\_\_

\_\_\_\_\_  
Name(s) Date(s) of Birth

\_\_\_\_\_  
Address

\_\_\_\_\_  
City State Zip

\_\_\_\_\_  
Phone E-Mail

For donor recognition purposes, I/we wish my/our name(s) to be listed for recognition purposes as follows:

I/We wish to remain anonymous

This is NOT a legal binding document. Your signature simple verifies that you believe this information is correct on the date you sign this form. Hesed House recognizes the value of a planned gift, as well as the provision creating the gift, may change over time. If possible, please notify us of future changes in your planned gift plans for Hesed House.

\_\_\_\_\_  
Signature(s) Date

**Thank you for your investment in providing hope and the ability to regain independence to the 400 men, women and children we serve every day !**

Public Action to Deliver Shelter, Inc. dba Hesed House is an Illinois 501(c)(3) non-profit organization and does not provide any legal or tax advice. Tax ID Number 36-3285644. Your gift is tax deductible to the extent of the law. Any questions, please contact Hesed House Director of Development Michelle Kallevik at 630-914-6128 or e-mail [donate@hesedhouse.org](mailto:donate@hesedhouse.org). Please return form to Hesed House along with relative letter of explanation or documentation.