

# Hattie Larlham Legacy Society

## Estate Intention Form

In the Hattie Larlham tradition of service beyond self, I wish to share my blessings with the over 1,400 children and adults with mental retardation, development disabilities, and medically fragile conditions served by the Hattie Larlham family of agencies. Therefore, I make this commitment and join the generous and caring individuals who have made provisions in their estate plans to provide future assistance to the children and adults served by Hattie Larlham through the Hattie Larlham Legacy Society of the Hattie Larlham Foundation.

This is a confidential record. It allows the Hattie Larlham Foundation to (1) ensure that your wishes are carried out, (2) recognize you for your gift now and in the future, (3) discuss with you any designations you may have for your gift, (4) and in some cases obtain matching funds from charitable foundations and corporations, thereby multiplying the effect of your gift. Please check the appropriate gift category and complete the following information, which applies to your future gift.

### Will/Trust Estate Gift Intent

I will include a provision in my will/trust to leave \$ \_\_\_\_\_ or \_\_\_\_\_ % of the residue of my estate to the Hattie Larlham Foundation. I estimate that the value of this provision in my estate plan would be approximately \$ \_\_\_\_\_ on today's date of \_\_\_\_\_. My Will/Trust was signed on this date \_\_\_\_\_. My Will/Trust provides that certain items or real or personal property shall be bequeathed to the Hattie Larlham Foundation through my estate. The items are as follows: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

As of today's date, I estimate that these items be worth approximately \$ \_\_\_\_\_.

My Will/Trust indicates that the bequest through my estate is unrestricted.

My Will/Trust directs the Hattie Larlham Foundation to use my bequest through my estate for a specific purpose. The specific purpose is as follows: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Please include a copy of your will/trust provision with contact information of the next-of-kin or professional advisor (including firm name, contact person, address, phone number) coordinating the distributions from the estate to ensure gift transfer efficiency.

