# LEGACY GIFT NOTIFICATION FORM

Name : _____/DOB:_____

Name : _____/DOB:_____

Address : _____

City : _____Prov:_____Postal Code:_____

Telephone : _____Email:_____

## Legacy Gift Intention

**I/We have named Project SHARE as a beneficiary of my/our:**

- ☐ Will/Living Trust
- ☐ Charitable Remainder Trust
- ☐ Retirement Assets
- ☐ Life Insurance Policy
- ☐ Annuity
- ☐ Other (please explain):_____

**My/Our planned gift is:**

- ☐ **Unrestricted** to provide maximum flexibility for Project SHARE to pursue it's mission
- ☐ **Restricted** for the following priority (please consult with Project SHARE if you are considering a restricted gift as we want to be able to honour your intention):_____

The approximate dollar amount or percentage of our gift is (optional to include, but helps Project SAHRE with future planning)**:**_____

Project SHARE wants to understand the "why" behind your legacy gift. If you don't mind, please share with us the reason you want to make such a meaningful gift to Project SHARE:_____

_____

Signature (note: This is not a legally binding document):_____

Date:_____

Signature (note: This is not a legally binding document):_____

Date:_____

# LEGACY GIFT RECOGNITION

**Documentation:**

- [ ] Attached is a copy of the relevant portions of the legal documents relating to my/our gift to Project SHARE or a letter from my legal or financial advisor that escribed the nature and purpose of the gift (this is optional, but helps Project SHARE with future planning).

**Attorney:**

Name:
Phone Number: _____
Email:_____
Address:_____

**Recognition:**

- [ ] I am/We are pleased to be publicly recognized for our legacy gift in the Project SHARE annual report

- [ ] I/We prefer to be anonymous

***Thank you for sharing details regarding your long-term financial plans. Information disclosed will be kept strictly confidential. This is not a legally binding document but helps us understand your wishes for the future.***

For more information, please contact Mackenzie Warren, Fundraising Coordinator, at 905-357-5121 ext. 248 or at fundraising@projectshare.ca

**PLEASE RETURN COMPLETED FORM TO:**

Project SHARE
Attn: Mackenzie Warren, Fundraising Coordinator
2-4129 Stanley Avenue
Niagara Falls, Ontario
L2E 7H3