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Relay Service for Hearing Impaired 711

CONFIDENTIAL

Bequest/Planned Gift Confirmation

The long-term fiscal stability of Housing Solutions of Northern Arizona, Inc. is dependent in large measure on the friends, volunteers and donors who designate HSNA as a beneficiary in their estate plans. Thank you for your legacy gift.

Allow us to celebrate your gift by confirming your plans below. (check one)

- I have made provision(s) for HSNA in my estate plan
I plan to include HSNA in my estate plan.

Name: Date of Birth:

Home Address:

City: State: Zip:

Telephone: Email:

Spouse's Name: Date of Birth:

Children: Date of Birth:

Children: Date of Birth:

This form is for informational purposes only. The information allows HSNA to document your recognition wishes and to celebrate your generosity today. It assists HSNA in clarifying and documenting specific charitable wishes, estimating the impact of overall legacy giving and planning for future endeavors.

DESIGNATING YOUR GIFT

Please note if you wish your gift to be designated to a particular program or purpose.

- General Endowment Sharon Manor Endowment Where Support Is Needed Most

RECOGNITION

I give permission to publicly recognize me as a member of the HSNA Legacy Circle, thereby encouraging others to consider a planned gift.

Name (as you wish it to appear in public recognition):

- I wish to remain Anonymous.

TYPE OF GIFT

- Charitable Lead Trust Will Living Trust
Charitable Remainder Trust Retirement Plan Assets Appreciated Assets
Life Insurance Policy: Company name/#:
Other:

ADVISORS

Attorney/Financial Planner: Phone:
Email:

AUTHORIZATION

Signature: Date:





Sample Language for Charitable Bequests and Distributions

Type of Gift	Language
Outright Bequest or Distribution	I give _____ [e.g., dollar amount, specific property, residuary estate, entire estate] to Housing Solutions of Northern Arizona, Inc. (HSNA), a nonprofit corporation of Arizona, whose mailing address is PO Box 30134, Flagstaff, AZ 86003. Tax ID #: 86-0732457.
Contingent Bequest or Distribution	In the event that _____ [name of primary beneficiary] shall not survive me, then I give _____ [e.g., dollar amount, specific property, residuary estate, entire estate] to Housing Solutions of Northern Arizona, Inc. (HSNA), a nonprofit corporation of Arizona, whose mailing address is PO Box 30134, Flagstaff, AZ 86003. Tax ID #: 86-0732457.
Ways to Make Charitable Bequests	<p>Fixed amount: "I give, devise and bequeath to Housing Solutions of Northern Arizona, Inc., a nonprofit corporation of Arizona, whose mailing address is PO Box 30134, Flagstaff, AZ 86003 (Tax ID#: 86-0732457) the sum of _____ dollars."</p> <p>Specific property: "I give, devise and bequeath to Housing Solutions of Northern Arizona, Inc., a nonprofit corporation of Arizona, whose mailing address is PO Box 30134, Flagstaff, AZ 86003 (Tax ID#: 86-0732457) [DESCRIPTION OF THE SPECIFIC PROPERTY GIFTED TO HSNA]."</p> <p>Percent or residuary: "I give, devise and bequeath to Housing Solutions of Northern Arizona, Inc., a nonprofit corporation of Arizona, whose mailing address is PO Box 30134, Flagstaff, AZ 86003 (Tax ID#: 86-0732457) all (or ___ percent of) the rest, residue and remainder of my estate."</p> <p>Contingent beneficiary: "If any legacy or devise shall fail or lapse and would therefore pass by intestacy, I direct that in lieu thereof such legacy or devise shall be paid to Housing Solutions of Northern Arizona, Inc., a nonprofit corporation of Arizona, whose mailing address is PO Box 30134, Flagstaff, AZ 86003 (Tax ID#: 86-0732457)."</p>

Charitable Bequest Information & Examples	
Types of Charitable Bequests	<p>Unrestricted: An unrestricted charitable bequest provides funds which the charity uses for its general purposes. This type of bequest is extremely useful to an organization because the assets can be put to use in areas of greatest need.</p> <p>Restricted: A restricted charitable bequest limits the charity to use the gift in a specific manner. This can be a restriction to a particular fund, project or special area of interest. It is preferable to have restricted bequests defined as broadly as possible. By avoiding narrowly restricted bequests, both donor and the charity are assured that the gift's effectiveness will not be reduced because of changing circumstances.</p>
Example of Beneficiary Gifts from Life Insurance, Retirement Accounts	Designation of Beneficiary forms are available through your local banker, life insurance broker or financial advisor and are completed most often when you initially open a bank, retirement or brokerage account or when you purchase life insurance. An update to your form can designate Housing Solutions of Northern Arizona, Inc. (HSNA) as an added beneficiary, for a % or all of an account or as a contingency beneficiary in the event your existing designated beneficiaries are deceased.

Bequest/Planned Gift Confirmation

Please confirm your gift through the HSNA Legacy Circle Bequest/Planned Gift Confirmation form. For information only, this form allows HSNA to document recognition wishes and to celebrate your generosity today. It assists in clarifying and documenting your specific charitable wishes and estimating the impact of overall legacy giving.