



### Beneficiary Designation Notice\*

Michael's Place invites you to become a member of the M.Christine Dennon Society, our recognition for donors who have made a planned gift benefitting Michael's Place. To become a member, simply fill out this form telling us about the beneficiary designations you have made to Michael's Place. We appreciate your future gift and want to properly thank you and acknowledge your investment in our mission.

- I understand that recognizing this gift in donor honor rolls may be an incentive for others to give, and I am willing to be publicly acknowledged.
- I prefer not to be listed or acknowledged publicly.
- I prefer to remain anonymous and request no contact or acknowledgment regarding this gift.

I have designated Michael's Place as a \_\_\_\_\_% beneficiary of my IRA or other retirement account. That account is invested with \_\_\_\_\_ and my future gift has a current *estimated value* of \$\_\_\_\_\_.

I have designated a specific gift of \$\_\_\_\_\_ for Michael's Place from my IRA or other retirement account. That account is invested with\_\_\_\_\_.

I have designated Michael's Place as a \_\_\_\_\_% beneficiary of my insurance policy. That policy is with \_\_\_\_\_ and my future gift has a current *estimated value* of \$\_\_\_\_\_.

- My future gift is unrestricted.
- I direct Michael's Place to use my future gift for a specific purpose. The specific purpose is as follows:\_\_\_\_\_.

For recognition purposes, please list my/our name(s) as:\_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Address: \_\_\_\_\_

Email: \_\_\_\_\_ Phone: \_\_\_\_\_

***\*This is a confidential record. I understand that I am not making a legal or binding commitment upon my estate by submitting this Estate Intention Form. Further, Michael's Place understands and acknowledges that the size of my future gift may be significantly different from the amount estimated above for the purposes of valuation.***