



# Cornerstone Society

## Confidential Statement of Legacy Gift



If you have made a legacy gift to Habitat for Humanity of Lake-Sumter, please take a moment to complete the form below and return it to us. Legacy donors who have remembered Habitat for Humanity of Lake-Sumter with a life income gift or have named us as a beneficiary of a will, trust, retirement plan, or life insurance policy are recognized members of the Cornerstone Society.

Name: \_\_\_\_\_ Is this a joint gift? Yes No

Spouse: \_\_\_\_\_

Mailing Address: \_\_\_\_\_ Telephone: \_\_\_\_\_

Email: \_\_\_\_\_ DOB: \_\_\_\_\_ Spouse DOB: \_\_\_\_\_

I/We have named Habitat for Humanity of Lake-Sumter as a beneficiary in one or more (please indicate if Habitat is named as primary, secondary, or contingent beneficiary):

(Check all that apply)

- ☐ Will or Living Trust: \_\_\_\_\_ specific amount or
- ☐ \_\_\_\_\_ % IRA, pension, 401(k), 403(b), or other retirement account
- ☐ Life Insurance Policy
- ☐ Charitable Remainder Trust (CRT)
- ☐ Charitable Lead Trust (CLT)
- ☐ Donor-advised Fund
- ☐ Other (please specify): \_\_\_\_\_

\_\_\_\_\_ (Please initial) I/We have attached copies of the documentation (ex. Sections of my will or trust, beneficiary designation forms, bank or brokerage statements, etc.)

\_\_\_\_\_ Gift Value (or best estimate)

Comments: \_\_\_\_\_

Please enroll me/us as a member of the Cornerstone Society:

- ☐ I/We may be included in a list of Cornerstone Society members in Habitat for Humanity of Lake-Sumter publications
- ☐ I/We prefer to remain anonymous, but will accept other benefits of membership

While this form is not a binding agreement or pledge, it simply permits us to record your estimated gift, recognize you for this intention, and “have the files in order” for future use. The details of this form as well as any additional information you share with us will remain confidential.

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