

Bequest Intention Form

Please mail/email form to:

Shelter, Inc.
1616 N. Arlington Heights Rd.
Arlington Heights, IL 60004
pprice@shelter-inc.org



Thank you for your generous bequest to Shelter, Inc. Please use this form to share details about your future gift. We understand that your gift is revocable and that you may change your plans at any time.

Name (Print) _____ Date _____

Address _____

City _____ State _____ Zip _____

Email _____ Phone _____

I have included Shelter, Inc. as a beneficiary of my:

- Will/Living Trust Retirement Plan Savings Account Life Insurance Policy
- My bequest is in the specific amount of: \$ _____

OR

- My bequest is a percentage worth approximately: \$ _____
(Please provide your best estimate of the value of your future gift, based on the approximate current value of your assets.)
- I wish to keep the value of my bequest private.
- My gift is contingent on the prior death of a spouse or partner.
- My spouse/partner has done the same. SHELTER, INC. will receive a gift upon the second-to-die.

Recognition:

- I would like to be recognized as: _____
(Most listings are First and Last Name(s) only. For example, Jane Smith or Jane and Michael Smith.)
- I want to be recognized for my gift, which may include listing my name within a dollar range.
- I want to keep my name and gift amount private. Please list me as Anonymous.

For more information, please contact Patrick Price, Director of Development, at pprice@shelter-inc.org.