



Legacy and Planned Gift Commitment Form

I/We have included USWRF in my estate planning:

NAME(S): _____

DATE(S) OF BIRTH: _____

ADDRESS:

PHONE: _____

EMAIL: _____

Type of Legacy or Planned Gift (please check all that apply):

- Bequest through will or trust
- Life insurance policy beneficiary
- Retirement plan/IRA
- Charitable gift annuity
- Charitable remainder trust
- Charitable lead trust
- Living trust
- Other trust
- Other

Please add any other details you wish to share:

Please send copies of any relevant documents in which a legacy or planned gift to USWRF is included. All information provided will be kept strictly confidential.

Value:

The estimated value in today's dollars of this gift is: \$ _____

Purpose of Planned Gift:

- The gift is unrestricted providing flexibility for USWRF to fulfill its mission
- I have a specific purpose in mind that I would like to discuss

Recognition:

_____ Please list my/our name(s) as: _____

_____ I/we wish to remain anonymous; please do not include my/our name in any listing of donors.

Signature: _____

Date: _____

Completion of this form is a notification of intent only and not intended to be legally binding. Please discuss your planned giving intentions with your professional financial and legal advisors. USWRF is a tax-exempt nonprofit organization recognized by section 501 (c)3 of the internal Revenue code. Tax ID # is 203482019. Contributions are tax deductible to the extents allowed by law.