

Planned Giving Intent Form

We are honored that you have made the generous decision to include the Delaware Historical Society (DHS) in your plans for the distribution of possessions and assets that you have accumulated in your lifetime. We understand that your gift is revocable and that you may change your plans at any time.

Please use the form to share details about your intended future gift.

Name(s) _____

Address _____

City _____ State _____ Zip Code _____

Home Phone _____ Mobile Phone _____

E-mail Address _____

Please indicate your type(s) of planned gift below:

☐ Bequest in my/our will _____ (percent or dollar amount)

☐ Trust _____ (percent or dollar amount)

☐ Retirement Plan Beneficiary

☐ Life Insurance Beneficiary

☐ Charitable Gift Annuity

☐ Family Foundation

☐ Donor Advised Fund Beneficiary

☐ Other (Real Estate, Land, Business, Securities)

Current Estimated Value of Bequest _____

Please add any details you wish to share about your gift intention.

Attorney/Financial Adviser Name and Phone Number (optional)

NEXT STEPS →

Next Steps

If you already have a will or trust, review the documents to determine if any changes in your family or other circumstances warrant revising the document.

If you wish to add Delaware Historical Society for a gift in your existing will or trust, contact the attorney who drafted the document and request a simple amendment.

If you don't have a will or trust, contact an experienced attorney to have these documents prepared.

Please share this suggested wording with you legal advisor.

I give to the Delaware Historical Society, a Delaware non-profit (Tax ID #51-0066731) or its successor, the sum of \$_____ for any purpose as the Delaware Historical Society deems appropriate.

I give to the Delaware Historical Society, a Delaware non-profit (Tax ID #51-0066731) or its successor, the real estate located at _____ or shares of any XXX shares of XYZ stock, for any purpose as the Delaware Historical Society deems appropriate.

I give to the Delaware Historical Society, a Delaware non-profit (Tax ID #51-0066731) or its successor, _____% of the rest of my estate, for any purpose as the Delaware Historical Society deems appropriate.

DHS recognizes that estate planning is highly personal matter and we will never share your name without your permission in our Honor Roll of Donors in the magazine or in any other publication or communication.

☐ I/We would like others to be encouraged by my/our example, and I/we hereby give permission for my/our name(s) to be recognized.

☐ I/We would like to remain anonymous and prefer that my/our name(s) not be published.

Signature _____ Date _____

If you have questions, please contact Director of Institutional Advancement Kathleen Butler at kbutler@dehistory.org.



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