

PLANNED GIVING DECLARATION OF INTENT

UnitedWayPBC.org/plannedgiving



United Way
of Palm Beach County

Thank you for your intention to include United Way of Palm Beach County in your estate plan. In order to accurately document your intention, please complete this form with as much detail as you are willing to share. Any information about your gift will remain confidential. Completion and submission of this form does not create a binding obligation.

DESCRIPTION AND VALUE OF YOUR GIFT: Please indicate how your future gift intention will be fulfilled and provide the estimated value, if possible.

Description	Amount or Percentage (circle one)	Estimated Planned Value of Gift	OR	Gift Amount as of Today
<input type="checkbox"/> Bequests in Will or Living Trusts	Amount / Percentage	_____		_____
<input type="checkbox"/> Charitable Gift Annuities	Amount / Percentage	_____		_____
<input type="checkbox"/> Charitable Lead Trusts	Amount / Percentage	_____		_____
<input type="checkbox"/> Charitable Remainder Trusts	Amount / Percentage	_____		_____
<input type="checkbox"/> Gifts of Plans and Policies	Amount / Percentage	_____		_____
<input type="checkbox"/> Life Insurance Policies	Amount / Percentage	_____		_____
<input type="checkbox"/> Real Estate Gifts	Amount / Percentage	_____		_____
<input type="checkbox"/> Life Estate Gifts	Amount / Percentage	_____		_____

RECOGNITION OF YOUR GIFT: We are honored to recognize your generosity through annual publications and events to celebrate the long term investment you are making in the quality of our region.

I/We would like to be recognized as: _____

Donor Name(s): _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Alternate Phone: _____

Email: _____

Signature: _____ Date: _____

For additional information, please contact Paula McLeod, Vice President of Major Gifts and Planned Giving, at 561-375-6635 or PaulaMcLeod@UnitedWayPBC.org

Please return this form, completed and signed to:
United Way of Palm Beach County
Attention: Paula McLeod
477 S. Rosemary Ave., Suite #230
West Palm Beach, FL 33401