

Confidential Statement of Intent

I/we have made a provision for Horizons Foundation in my/our estate plan as a way of ensuring the future strength of the LGBT community.

Name (please print) _____
Date of birth

Name (please print) _____
Date of birth

Address

Telephone _____
Email

Description of the gift:

- Bequest in will or trust
- Beneficiary of life insurance policy
- Beneficiary of retirement plan
- Charitable trust agreement
- Other (please describe on opposite side)
- The gift is subject to conditions (please describe on opposite side)

Optional, but helpful to Horizons Foundation:

- Attached is a copy of the portion of the will, trust, or document pertinent to this gift
- The approximate value of this gift is \$_____.

Publication and communication

Horizons Foundation periodically publishes a list of Legacy Circle members unless members request to remain anonymous. Publishing your intention encourages others, by means of your example, to make similar gifts. All details about type or amount of each member’s intention will remain confidential.

- Please list my/our name(s) as: _____
- Please do not publish my/our name(s) in connection with Horizons Foundation’s Legacy Circle
- Please send me only communications specifically for the Legacy Circle (i.e., no general newsletter, etc.)
- Please send me only the foundation’s annual report each year

This statement of intent does not constitute a legally binding pledge or agreement for me or for my estate. It documents only my intent, and may be amended at any time.

Signature _____
Date

Signature _____
Date

Please return this form to:

Deb Stallings, Director of Development and Gift Planning
Horizons Foundation
870 Market Street, Suite 728
San Francisco, CA 94102

Phone 415.398.2333 x103
Fax 415.398.4733
Email dstallings@horizonsfoundation.org