

PLANNED GIFT INTENTION FORM

If you have included the Lima Memorial Foundation in your will or trust or another planned gift, please consider letting us know the details. We would like to welcome you into the Heritage Society, which acknowledges individuals who make a bequest and / or planned gift to the Lima Memorial Foundation.

I / WE HAVE INCLUDED THE LIMA MEMORIAL FOUNDATION IN OUR ESTATE PLAN:

Name(s)

Address

City State Zip

Email Phone

HERITAGE SOCIETY LISTINGS AND PUBLICATIONS:

Yes. You may include me / us in planned gift listings and publications.
Name/s as you would like it published:

No. I wish to remain anonymous.

OPTIONAL INFORMATION

PLANNED GIFT AS A BEQUEST IN A WILL OR AS A TRUST BENEFICIARY AS FOLLOWS:

I / we have included the Lima Memorial Foundation in my / our will or trust.

Yes

and / or

PLANNED GIFT AS BENEFICIARY OF ASSET

I / we have included the Lima Memorial Foundation as a beneficiary of the following asset:

Charitable Gift Annuity Life Insurance IRA or Retirement Plan

Other Type of Asset

SIGNATURE

DATE

THANK YOU.