

DECLARATION OF FUTURE INTENT



Thank you for your intention to include Bike East Bay in your estate plan. We ask that you complete this form with as much detail as you are willing to share. Any information about your gift will remain confidential and does not create a binding obligation.

New Intention

Updated Intention

MY/OUR INFORMATION:

Name (print): _____ Spouse name (if joint gift): _____

Address: _____ City: _____ State: _____ Zip Code: _____

Phone Number: _____ Email Address: _____

GIFT INFORMATION:

I/We have provided a gift to Bike East Bay as set forth in my/our:

Will or Trust

Charitable Gift Annuity

Life Insurance Policy

Charitable Remainder Unitrust

Retirement Plan or
Beneficiary Designation
(401(k), 403(B), IRA, Keogh,
Brokerage Account)

Other Asset(s) (please
describe): _____

Bike East Bay is a contingent beneficiary of the indicated asset above (please explain):

The current estimated value of my/our gift is \$ _____. My/Our gift is _____% of the asset indicated above. If a percentage is given, what is the current estimated value of the percent in today's dollars \$ _____.

GIFT PURPOSE:

You can indicate that your gift be used for Bike East Bay's regional and local priorities or for a specific area or program that matters to you.

Would you like your gift to be used for a specific purpose? Yes No

If you checked yes, please tell us how to direct your gift: _____

Bike East Bay uses charitable gifts to support regional and local priorities unless otherwise specified by the donor.

Please continue to the reverse side to complete the form

RECOGNITION:

How would you like to be recognized for your gift?

I/We would like to be listed as (a) Legacy Donor(s), which may include listing my/our gift within a dollar range. Please list my/our name(s) as: _____

I/We prefer that my/our gift not be listed within a dollar range, but you may list my/our name(s) as (a) Legacy Donor(s). Please list my/our name(s) as: _____

I/We wish to remain anonymous for this gift.

ESTATE CONTACT INFORMATION:

Although optional, the following information is very helpful:

Executor, Trustee
(if your gift is through a Will, Trust):

Name: _____
Address: _____
City, State: _____ Zip Code: _____
Phone: _____
Email: _____

Administrating Company (ie. TIAA, Fidelity, etc.,
if your gift is through a retirement account or life
insurance policy):

Name: _____
Address: _____
City, State: _____ Zip Code: _____
Phone: _____
Email: _____

Additional Contact/Relationship you may want us to know (family, attorney, etc.)

Name: _____ Relation: _____

Address: _____ City, State: _____ Zip Code: _____

Phone: _____ Email: _____

I/We understand this form does not create a binding obligation and any details about my/our gift will remain confidential. Bike East Bay understands that the size of my/our future gift may change.

Signature: _____ Spouse Signature (if joint): _____

Date: _____