



# DECLARATION OF FUTURE INTENT

Thank you for your intention to include HAVEN in your estate plan. We ask that you complete this form with as much details 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**

**Planning a bequest? Here is all the information you will need to document it:**

- Your completed Declaration of Future Intent form AND a copy of one of the following (if available):
- The portion of your will or trust document referencing HAVEN **OR**
- Designation form with available information (plan type, name of account owner, plan administrator, most recent market value information **OR**
- A signed gift agreement or gift letter detailing the use of your gift by HAVEN

### My/Our Information

Name: \_\_\_\_\_ Spouse Name (if joint gift): \_\_\_\_\_  
 Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
 Cell Phone: \_\_\_\_\_ Email: \_\_\_\_\_

### Gift Information

I/We have provided a gift to HAVEN as set forth in my/our:

- |   |   |
|---|---|
| <input type="checkbox"/> Will or Trust                              | <input type="checkbox"/> Will or Trust  |
| <input type="checkbox"/> Life Insurance Policy                      | <input type="checkbox"/> Retirement Plan or Beneficiary Designation<br>(401k, 403b, IRA, Brokerage Account) |
| <input type="checkbox"/> Other Asset(s) (please describe):<br>_____ | <input type="checkbox"/> HAVEN is a contingent beneficiary of the indicated asset:<br>_____                 |

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

- Gift Agreement/Letter** - I/ We have signed a Gift Letter or Agreement with HAVEN stating the designation or purpose for this gift.
- I/We have not signed a Gift Letter or Agreement** - It is my/our intention that HAVEN use this future gift (briefly describe the program or fund you would like your gift to benefit. If multiple areas, please provide percentages or specific amounts):

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_



HAVEN

# DECLARATION OF FUTURE INTENT

## Recognition

Recognition in the HAVEN Giving Society is automatic upon receipt of notice that HAVEN is named as a charitable beneficiary of your plan, estate, life insurance policy, annuity contract or life income gift. Members of the HAVEN Giving Society receive recognition in the annual report and invitations to periodic donor appreciation events, both virtual and on-site.

HAVEN may appropriately recognize the Donor(s) during life and posthumously, which may include print or electronic media and other suitable means. When included in donor listings or otherwise recognized, the Donor name(s) will appear as follows:

I/We prefer to opt out

## Executor/Trustee

(if your gift is through a Will/Trust)

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City/State: \_\_\_\_\_ Zip: \_\_\_\_\_

Email: \_\_\_\_\_

Cell Phone: \_\_\_\_\_

## Administrating Company

(i.e. TIAA, Fidelity, etc., if your gift is through a retirement account or life insurance policy)

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City/State: \_\_\_\_\_ Zip: \_\_\_\_\_

Email: \_\_\_\_\_

Cell Phone: \_\_\_\_\_

## Additional Contact/Relationship

(family, attorney, etc.)

Name: \_\_\_\_\_ Relation: \_\_\_\_\_

Address: \_\_\_\_\_ City/State: \_\_\_\_\_ Zip: \_\_\_\_\_

Email: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

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

Signature: \_\_\_\_\_

Spouse Signature (if joint): \_\_\_\_\_

Date: \_\_\_\_\_

Please return this form to:

HAVEN, Development Office | 801 Vanguard Dr, Pontiac, MI 48341

For questions or additional information contact the Development Director at [development@haven-oakland.org](mailto:development@haven-oakland.org)