



Planned Giving Declaration of Future Intent

Thank you for supporting the dogs and cats of your community! In an effort to accurately document your intention, celebrate your generosity and keep you informed of our goals and accomplishments, please complete this form with details you are comfortable providing. Information will be kept confidential and does not constitute a binding obligation.

My/Our Information:

Name (print): _____ Spouse name (if joint gift): _____
Address: _____ City: _____ State: _____ Zip Code: _____
Phone Number: _____ Email Address: _____

Description of Gift:

I/We have provided a gift to Heart of the Valley Animal Shelter in the following estate provision (check all that apply):

Description

Amount or Percentage

- Will or Trust _____
 - Charitable Gift Annuity _____
 - Charitable Remainder Trust _____
 - Remainder of Retirement Fund/IRA _____
 - Life Insurance Policy _____
 - Other Item or Asset _____
- (Please describe): _____

- I/We have attached a copy of the portion of my/our estate document that names Heart of the Valley Animal Shelter as a beneficiary.
- Heart of the Valley Animal Shelter is a contingent beneficiary under the following conditions:

Gift Purpose:

I/We wish to direct support to the following:

- Where the need is greatest.
- Best Friends Forever Endowment Fund
- Other: _____

Please Complete Reverse Side

Gift Recognition:

- For recognition purposes, please list my/our name(s) as follows:

- I/We give permission to list my/our name(s) as a member(s) of the Best Friend Legacy Society (for recognition purposes only) with the understanding that the amount of my/our arrangement is strictly confidential.

- Although Heart of the Valley Animal Shelter is currently included in my/our estate, I/we wish to remain anonymous and not be included in the Best Friend Legacy Society.

Contact Information

Will or Trust – If your gift is included in a will or trust, please provide the following:

Executor(s) or Trustee(s)

Name and Address

Phone and/or email

Beneficiary Designation – If your gift is directed by a beneficiary designation, please provide the following:

Administrator or Company

Name and Address

Phone and/or email

Other Information, Contacts, and Relationships you want us to know (family, attorney, etc.)

Name and Address

Phone and/or email

This Declaration of Intent is an expression of my/our present plans and is subject to change or modification by me/us. This form does not create a binding obligation and any details about my/our gift will remain confidential.

Signature: _____ Spouse (if joint): _____

Date: _____ Date: _____

Please return this form to: Heart of the Valley, 1549 East Cameron Bridge Road, Bozeman, MT 59718
email: tiffany@heartofthevalleyshelter.org | phone: 406-404-3069 | fax: 406-388-2877

