



Lifespan's Circle of Life Society

DECLARATION OF INTENT FOR A PLANNED GIFT

Welcome to Lifespan's Circle of Life Society. Thank you for naming Lifespan is your estate plan.

The information you provide on this form will ensure Lifespan has accurate records and can provide the best stewardship of your gift. This is not a binding legal document, and your information will be kept confidential. If you have questions, please contact Lifespan's director of development, Diana Palotas, at 585-287-6382 or by email at dpalotas@lifespanrochester.org.

Please tell us about your gift.

Date of estate plan or designation: _____

Type of deferred gift

- Will provision
- Life insurance policy
- Charitable Remainder Trust
- Charitable Gift Annuity
- Gift of real estate
- Retirement account
- Other

Is this gift revocable or irrevocable?

- This gift is revocable (can be changed)
- This gift is irrevocable (cannot be changed)

Is this a percentage or a specific amount?

- This gift is a percentage.
- The gift is a specific amount.

Please tell us about your gift designation.

- I have planned this gift in honor or memory of someone.
- I would like this gift to provide for a specific purpose. See specifications below.*
- Lifespan may use this gift where it is needed most.

Please indicate if we can list you as a member of our Circle of Life Society or if you would like to remain anonymous.

- You may list me as a member of the Circle of Life Society.
- I wish my intentions to remain anonymous.

FIRST NAME	LAST NAME	
DATE OF BIRTH		
ADDRESS		
ADDRESS		
CITY	STATE	ZIP
PHONE	EMAIL	
*SPECIFICATIONS		

Please direct your gift to Lifespan of Greater Rochester Development Fund Inc.
Tax ID # 16-1403060

If possible, we would appreciate a copy of the relevant pages of your bequest or provision that refers to Lifespan. This is optional.

