



Partners in Promoting Independent Living

Planned Giving Strategy:

An impactful way to support charitable causes that enhance YOUR legacy while supporting your community.

What goals would you like to achieve with your planned giving strategy (check all that apply):

- Enhance and support a wonderful organization beyond an annual gift
- Expand the impact of LifeSpan Resources in southern Indiana
- Ensure the great work of LifeSpan Resources continues for many years to come

LifeSpan Resources Legacy Circle

The LifeSpan Resources Legacy Circle honors those who have designated a charitable gift to our agency as part of their estate planning. Recognition includes invitations to special events, inclusion in our Annual Report and acknowledgement on the Legacy Circle website, gala program and Senior Games Loved Ones Book. Please note your name(s) exactly as you wish them to appear or let us know if you prefer to make your planned gift anonymously.

Name(s): _____

I/We prefer to make this planned gift anonymously.

Signature(s) _____ Date _____

Our expert consultants are available to help you with planned giving strategies:

**Dave Lobeck, Financial Advisor
James P. Plitz, Attorney
J. Scott Waters, Attorney**

Please return this completed form and address questions to:

**Lucy Koesters, Chief Business Development Officer
LifeSpan Resources
33 State St., PO Box 995, New Albany, IN 47151
lkoesters@lsr14.org
Phone: 812-206-7938**

All information provided will be kept in the strictest confidence and used for internal planning only.

**Legal Name: LifeSpan Resources Inc.
Address: 33 State St., PO Box 995, New Albany, IN 47151
Tax ID: 35-1306887**

NOTE:

Please see BACK of page to specify your intention.





Planned Gift Intention Form

Partners in Promoting Independent Living

Yes! I/We intend to join LifeSpan Resources Legacy Circle. To demonstrate my/our commitment to support LifeSpan Resources' continued efforts to improve the lives of thousands of Southern Indiana residents and their need to live independently, I/We have made charitable provisions for LifeSpan Resources in my/our estate plan.

Name(s): _____

Birthdate(s): _____

Address: _____

City

State

Zip

Home Phone: (____) _____ Mobile Phone: (____) _____

Email: _____

Please indicate your type(s) of planned gift below. Completion of this form is not intended to be legally binding, but notification of intent.*

Planned Gift Option	Percentage/Dollar Amount (optional)	Primary Beneficiary/Contingent Beneficiary Name of Provider for Endowment/Trust/
Bequest in my/our will		
Trust		
Retirement Plan Beneficiary		
Life Insurance Beneficiary		
Family Foundation Beneficiary		
Endowment or Donor Advised Fund (name of provider)		
Other (real estate, land, securities, etc.)		

Estimated value of your planned gift (optional): _____

Name and Phone Number of Attorney or Financial Advisor: _____

Sample Bequest Language: "I give, devise, and bequeath to LifeSpan Resources, Inc., a 501(c)3 non-profit corporation, _____ (insert a sum or percentage of your estate) as an unrestricted gift."

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**Completion of this form is not intended to be legally binding, but as notification of intent. Please discuss your planned giving intentions with your professional advisor. LifeSpan Resources is a tax-exempt nonprofit organization recognized by section 501(c)3 of the Internal Revenue Code. Contributions are deductible as allowed by law.*

Planned gifts will be used at the discretion of the organization, and may be used in a match fund, capital campaign or endowment. Unless your planned gift is specifically restricted, LifeSpan Resources executive leadership team will determine the best use of your generous contribution.