

UNITE AGAINST THE CYCLE.

## LEGACY SOCIETY MEMBER INFORMATION FORM

### ABOUT YOU

Your Name \_\_\_\_\_ Spouse's Name \_\_\_\_\_

Your Date of Birth \_\_\_\_\_ Spouse's Date of Birth \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

### GIFTS

I have included Valley of the Sun United Way as a beneficiary in my Will

This gift is [ ] a specific dollar amount [ ] a percentage of my estate [ ] a specific asset.

Please provide details about the nature of this gift:

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

The estimated value of this gift is: \$ \_\_\_\_\_

I have attached a copy of my Will to this form \*optional

I have included Valley of the Sun United Way as a beneficiary in my

\_\_\_\_\_ (fill in type of Trust) Trust

This gift is [ ] a specific dollar amount [ ] a percentage of my estate [ ] a specific asset.

Please provide details about the nature of this gift:

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

The estimated value of this gift is: \$ \_\_\_\_\_

I have attached a copy of my Trust to this form \*optional

*(continued on the next page)*

# UNITE AGAINST THE CYCLE.



- I have named Valley of the Sun United Way as a beneficiary on a life insurance policy

The estimated value of this gift is: \$ \_\_\_\_\_

- I have attached a copy of the beneficiary designation to this form \*optional

- I have named Valley of the Sun United Way as a beneficiary on a retirement account

The estimated value of this gift is: \$ \_\_\_\_\_

- I have attached a copy of the beneficiary designation to this form \*optional

- Additional/other type of Planned Gift \_\_\_\_\_

The estimated value of this gift is: \$ \_\_\_\_\_

## BEQUEST LANGUAGE

Although you should carefully review the terms of your Will or Trust with an appropriate professional advisor, we are happy to provide the following Sample Bequest Language:

I give, devise and bequeath to Valley of the Sun United Way, 3200 E. Camelback Rd, Suite 375, Phoenix, AZ 85018, the sum of \$ \_\_\_\_\_ /or \_\_\_\_\_ % of my estate/or the following specific asset \_\_\_\_\_

for the benefit of Valley of the Sun United Way and its general purposes/or to be added to its endowment.

## RECOGNITION

- I/we welcome recognition of this gift in Valley of the Sun United Way publications in the following name/s \_\_\_\_\_

- I/we prefer to remain anonymous.

Unless otherwise specified, your legacy gift will support our endowment, building a permanent capital reserve and ensuring our success for generations to come.

For more information about how to support Valley of the Sun United Way through planned giving, please contact Lisa Groves, JD, Major & Planned Giving Officer at [lgroves@vsuw.org](mailto:lgroves@vsuw.org) or (602) 631-4806

Valley of the Sun United Way is a 501(c)(3) nonprofit, EIN # 86-0104419. Please use this number to further identify us when making a legacy gift.

***We would be happy to meet with you or your professional advisors to explore the many options for turning your gift into a meaningful legacy!***

602.631.4800 | [information@vsuw.org](mailto:information@vsuw.org)

[vsuw.org](http://vsuw.org)    

