



Legacy Circle

CONFIDENTIAL STATEMENT OF BEQUEST PROVISION

Thank you for your generosity and support of our mission. Documenting your bequest allows us to better steward your future gift and personally express our gratitude to you now. Your gift solidifies a lifelong relationship with the Society that will ultimately be made permanent by the legacy you leave.

As a demonstration of my/our support for the Lowell Humane Society, I am/we are pleased to have made a bequest provision as indicated below:

- Will or revocable trust
- Other type of trust: _____
- IRA or retirement plan beneficiary designation
- Life insurance beneficiary designation
- Other beneficiary designation (e.g. bank account, bond, donor-advised fund):

Based on the information available to me/us as of the date hereof, the estimated current value of my/our testamentary gift to the Lowell Humane Society is approximately:

\$ _____ or undisclosed

DONOR

SPOUSE/PARTNER

Donor Names: _____

Signatures: _____

Date: _____

Date of Birth: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

I wish to remain anonymous, please do not include my name in official publications

I have notified the following professional advisor(s) of this gift (optional) :

Name: _____ Business Name: _____ Phone: _____

Name: _____ Business Name: _____ Phone: _____

The Lowell Humane Society understands that this statement of bequest provision is not a legal or binding commitment, and that the amount listed above is an estimate. You have the right to revise this gift at any time if the circumstances change. As a courtesy, the Lowell Humane Society will appreciate notification in that event. Based on the information provided, your gift will be recognized but the details of this form will remain confidential.

Legacy Circle members will be named in our annual report unless you select "I wish to remain anonymous" above.

As always, please consult your financial, tax, and /or legal advisers to determine the benefits of making a planned gift.

Lowell Humane Society Tax ID: 04-2104400

Please return this form with any related documentation to:

Lowell Humane Society
Legacy Circle
951 Broadway St
Lowell, MA 01854

OR E-mail to: Legacy@lowellhumanesociety.org