

**ESTATE INTENTION FORM – The Arc Mid-Hudson Foundation: Tax ID: 14-1721977**

**This is a confidential record.**

In order to include you in the *Legacy Society*, please complete and sign this Estate Intention Form, which applies to your future gift of a bequest to The Arc Mid-Hudson Foundation for the benefit of The Arc Mid-Hudson through your Will or Living Trust.

**Recognition**

- I/We understand that listing this gift may be an incentive for others to give and willing to be publicly acknowledged. Please list the donor name(s) as followed: \_\_\_\_\_
- I/We prefer not to be listed or acknowledged publicly.

**Provisions**

- The Will/Trust provides that \_\_\_\_\_% shall be bequeathed to The Arc Mid-Hudson Foundation for the benefit of The Arc Mid-Hudson through the estate. As of (month/day/year) \_\_\_\_\_ the estimated value of this provision in the estate plan would be approximately \$ \_\_\_\_\_.
- The Will/Trust provides that an outright gift of: \$ \_\_\_\_\_ shall be bequeathed to The Arc Mid-Hudson Foundation for the benefit of The Arc Mid-Hudson through the estate.
- The Will/Trust was signed on (month/day/year): \_\_\_\_\_

- The Will/Trust indicates that the bequest through the estate is unrestricted.
- The Will/Trust directs The Arc Mid-Hudson use the bequest for a specific purpose, which is as follows (please contact the Foundation office to make sure your gift can be used as intended):  
\_\_\_\_\_

- The Will/Trust provides that certain items of real or personal property shall be bequeathed to The Arc Mid-Hudson Foundation for the benefit of The Arc Mid-Hudson through the estate. As of (month/day/year) \_\_\_\_\_ the estimated value of these items is approximately \$ \_\_\_\_\_. The items are as follows:  
\_\_\_\_\_  
\_\_\_\_\_

*I understand that I am not making a legal or binding commitment upon my estate by submitting this Estate Intention Form. Further, The Arc Mid-Hudson Foundation should understand that the size of my future gift might be significantly different from the amount estimated above for the purposes of valuation. If for any reason in the future The Arc Mid-Hudson Foundation is no longer included in my estate plan, I will notify you so that you can update your records and remove me from the planned giving Legacy Society.*

**Please Print:**

Donor Full Name(s): \_\_\_\_\_ / \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ ST: \_\_\_\_\_ Zip: \_\_\_\_\_

Tel. #: (\_\_\_\_) \_\_\_\_\_ Email Address: \_\_\_\_\_

Signature(s): \_\_\_\_\_ / \_\_\_\_\_ Date: \_\_\_\_\_

**Please return this form to:** The Arc Mid-Hudson Foundation, 471 Albany Avenue, Kingston, NY 12401. If you have questions, please contact Lori McCabe, Senior Director of Communications & Development at (845) 331-4300 ext. 41228 or [Lori.McCabe@ArcMH.org](mailto:Lori.McCabe@ArcMH.org). Thank you for creating your Legacy!