



PLANNED GIFT PLEDGE LETTER

Archibald Willard Circle

In support of The Western Reserve Society Sons of The American Revolution (WRSSAR), I/we intend to provide a gift through my/our estate as detailed below. In order to properly record and acknowledge the gift, I am providing the following information about my/our estate plans;

Name(s) _____

Birthdate(s) _____

Address _____

City _____ State _____ Zip _____

Phone _____ E-mail _____

Professional Advisor _____ Phone _____

TYPE OF GIFT

It is my/our intent to provide a legacy gift through my/our:

- Bequest
- Retirement Plan Assets
- Life Insurance Policy

DESCRIPTION OF GIFT

Please describe the nature of your gift. (*For example - percentage of estate, specific amount, property description, etc.*)

Estimated present day value of gift \$ _____

Used for long-term planning and recognition purposes only, not a binding valuation.

PURPOSE OF GIFT

- Area of Greatest Need (General Fund)
- Other _____

DOCUMENTATION OF GIFT

- A copy of the provision is attached
- A copy of the provision will be sent once executed (*NOTE: A planned gift is not considered fully documented until a copy of the provision is received.*)

Please indicate how you would like to be recognized as a member of The Archibald Willard Circle, on our planned giving contributor's recognition list:

Signature _____ Date _____

Thank you for your support of **WRSSAR**. If you have any questions, please contact William Ross, at wross62@outlook.com or Compatriot Michael Kertes at mskertes@oh.rr.com
The Western Reserve Society Sons of the Revolution is a 501©(3) non-profit organization. All gifts are tax deductible as provided by law.
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