



# CONFIDENTIAL ESTATE INTENTION FORM



The following Estate Intention Form helps SOLV to:

- Properly thank and acknowledge donors who have remembered SOLV in their estate plans
- Inform friends of SOLV of the various ways they can make gifts through their estates
- Collect and list names of donors through the Gift to Oregon Society, thus encouraging other friends of SOLV to make their own estate gifts
- Assist SOLV in tracking its planned giving program progress

All your information will be kept confidential.

Please complete this form and mail or fax it to:

**Michelle Meyer**  
**Director of Development**  
**SOLV**  
**5193 NE Elam Young Parkway, Suite B**  
**Hillsboro, OR 97124**  
**Fax: (866) 357-6386**

If you have questions or comments, contact Michelle Meyer at (503) 844-9571 x304 or [michelle@solv.org](mailto:michelle@solv.org).

1.  Please contact me to talk about my intention to make a gift through my estate to SOLV.
2.  I have remembered SOLV in my estate plan:

Describe -- such as type of gift (will, trust, insurance, IRA , etc.) and if it is unrestricted or restricted:

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As of this date \_\_\_\_\_ I estimate this deferred gift is worth approximately \$\_\_\_\_\_ (optional).

- I want my name listed in the Gift to Oregon Society with those making similar gifts to encourage others to follow our lead.
- I prefer to keep my gift anonymous.

(over)

**SOLV**  
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**PAGE 2 OF 2**

With the above information, I understand that I am NOT making a legal or binding commitment by submitting this form. SOLV understands that the size of my future gift might be different from the amount estimated above. If for any reason in the future SOLV is no longer included in my estate plan, I will notify you so you can update your records and remove me from the Gift to Oregon Society list.

***Please Print***

Name(s) \_\_\_\_\_ Birthdate(s) \_\_\_\_\_

Name(s) \_\_\_\_\_ Birthdate(s) \_\_\_\_\_

Address \_\_\_\_\_ City/State/ZIP \_\_\_\_\_

Phone \_\_\_\_\_ E-mail \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_



It's Our Nature To Volunteer