

Declaration of Future Intent

Thank you for joining the Legacy Circle and for your intention to include Covenant Living in your estate plan. Please complete this form with as much detail as you are willing to share. Information about your gift will remain confidential and does not create a binding obligation.

New Intention Updated Intention

MY INFORMATION

Name _____ Spouse Name (if joint gift) _____

Address _____

Phone _____ Email Address _____

GIFT INFORMATION

I have provided a gift to Covenant Living as set forth in my:

- Will or Trust Life Insurance Policy Charitable Gift Annuity Charitable Remainder Unitrust
 Retirement Plan or Beneficiary Designation (401(k), 403(b), IRA, Keogh, Brokerage Account)
 Other Asset(s) _____
 Covenant Living is a contingent beneficiary of the indicated asset above. Please explain below:

Please indicate one of the following options and complete the applicable information:

- My gift has a set value of \$_____.
 My gift is _____% of my estate, with a conservative estimated value* of \$_____.
*Your estimated gift amount is confidential and will not be shared publicly.

GIFT PURPOSE

My bequest or planned gift is designated for:

- A Covenant Living community of my choice: _____
 Covenant Living Communities and Services

My bequest or planned gift is to be used for:

- Benevolent Care Fund Unrestricted
 Other (Please note which area(s) you wish to benefit and provide percentages or specific amounts for multiple areas.)

RECOGNITION

Donors of a planned gift to Covenant Living will be recognized as members of the Covenant Living Legacy Circle in print, verbal, or digital form.

Please list my name(s) as follows:

I prefer no public recognition

I understand this form is confidential and non-binding.

Signature:

Spouse's Signature:

Date _____

Date _____

Please sign and return this form to: Covenant Living Communities and Services - Office of Philanthropy
By Mail: 5700 Old Orchard Rd., Skokie, IL 60077
By Phone: (773) 878-4537 • **By Email:** Giving@CovLiving.org