



# Legacy Society Membership

The Bridge Home recognizes those caring individuals who have included us in their will or estate plans. Honorary membership in the Legacy Society is our way of expressing our deep gratitude for joining us to create your personal lakes legacy.

If you have included The Bridge Home in your will or estate plans, please let us know so we may thank you!

### Legacy Society Membership Confirmation:

I/We confirm that I/we have taken steps to make a planned gift to benefit The Bridge Home.

NAME(S) \_\_\_\_\_  
ADDRESS \_\_\_\_\_  
CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_  
PHONE \_\_\_\_\_ EMAIL \_\_\_\_\_

Please Sign: \_\_\_\_\_  
Signature(s) Date

NOTE: This indicates only the intent to make a gift. This is not a binding document. If you need additional information about or assistance with making a planned gift to The Bridge Home, please contact Jodi Stumbo at 515.232.8075 ext. 201.

### Public Acknowledgement of Membership in the Legacy Society Please check one of the following:

Yes, I/WE would like my/our name(s) listed in The Bridge Home publications as part of the Legacy Society. Please list my/our name(s) as follows:

\_\_\_\_\_  
Please print name(s)

No, I/WE would not like my/our name(s) listed in The Bridge Home publications as part of the Legacy Society. My/our gift should be listed anonymously.

**Please remember to have all documents prepared by your attorney.** Appropriate language would include: "I give, devise and bequeath to The Bridge Home a private 501c3 organization (Tax ID 42-1252893), (dollar amount or specific personal property item(s) and/or real property), to be used for \_\_\_\_\_.

Please provide contact information for your Attorney:

Attorney's Name \_\_\_\_\_  
Attorney's Phone \_\_\_\_\_ Attorney's Email \_\_\_\_\_  
Attorney's Address \_\_\_\_\_  
City/State/Zip \_\_\_\_\_

This form is for general purposes only and is not intended as legal or financial advice. The Bridge Home recommends that each person considering a planned gift consult with her or his own legal or financial advisor.

## Details of Legacy Society Membership:

Please answer the following questions to the extent to which you feel comfortable. It is often helpful to have a record of pertinent details of your plans to ensure that your wishes are carried out. Please provide details below or attach them separately. (\*Please attach a copy of the page or section from your will containing the bequest for our files.\*) If you are comfortable providing approximate amounts of your provision or percent of your estate, please do so. This document is confidential.

1. I have made the following provision(s) for my estate plan to include The Bridge Home:

**Bequest in my will\***

\_\_\_\_\_

**Charitable Trust** arrangement with The Bridge Home as beneficiary

\_\_\_\_\_

**Charitable Gift Annuity** with The Bridge Home as beneficiary

\_\_\_\_\_

**Retirement Account** with The Bridge Home as beneficiary

\_\_\_\_\_

**Other** (please explain)

\_\_\_\_\_

\_\_\_\_\_

2. Does The Bridge Home have a service or program that is of special interest to you?

\_\_\_\_\_

3. How did you learn about the Okoboji Foundation Legacy Society? (Please check all that apply)

Attorney (Name)\_\_\_\_\_

Family/Friends (Name)\_\_\_\_\_

Financial Advisor (Name)\_\_\_\_\_

The Bridge Home publication, event or publicity \_\_\_\_\_

The Bridge Home staff or board member (Name)\_\_\_\_\_

Other, please explain \_\_\_\_\_

4. Is there any other information you would like to share?

\_\_\_\_\_

\_\_\_\_\_

Please return to: The Bridge Home  
225 S Kellogg  
Ames, IA 50010

Phone 515.232.8075  
Email [legact@amesshelter.org](mailto:legact@amesshelter.org)  
Website [www.thebridgehome.org](http://www.thebridgehome.org)

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