



Estate Gift Intention Form

Yes, I have made provision for a gift to Lancaster Lebanon Habitat for Humanity through my estate plan. I have provided for Lancaster Lebanon Habitat by way of:

Will/Living Trust

Retirement Plan

Life Insurance

Other _____

Legacy Builders Circle

Habitat welcomes all planned giving donors to its Legacy Builders Circle. Members are recognized with special insider invitations and updates, as well as public acknowledgment for those who give us permission to list their names.

Providing Information About Your Gift Intentions

Explaining how you have provided for Lancaster Lebanon Habitat below will help us ensure that your gift intentions are understood and fulfilled. For example, *Lancaster Lebanon Habitat for Humanity will receive 20% of our residual estate after both my spouse and I have passed. Or, Lancaster Lebanon Habitat for Humanity is a 100% contingent beneficiary of my 401(k) account with Charles Schwab.*

Estimating Your Habitat Gift

Providing an estimate of the current value of your gift below can help Habitat plan for the future. That said, Habitat will not rely on the estimate, recognizing that many factors can affect the eventual value and that you may choose to revoke or modify your plans at any time.

Questions? Please contact
Amy Balestier
Director of Development and Communications
Amyb@llhfh.org (223) 444-6415

Directing Your Habitat Gift

Your gift will be used where the need is greatest at the time, unless there are particular initiatives that you would like to direct your gift toward. In which case, please specify your preferred initiative(s) in the space below.

Example: *I desire to have my eventual gift support the following initiative(s). I understand that at the time of my gift, if circumstances have changed so significantly that it is no longer practical to use my gift in this manner, Habitat's Board of Directors retains the right to use my gift for other purposes that most closely fit my original intent.*

Documentation and Recognition

- Attached is a copy of relevant portions of my will or estate plan provision, or the beneficiary designation document that names Lancaster Lebanon Habitat for Humanity.

Legacy Builders Circle

- You may include my name in the published list of Legacy Builders Circle members, as written below.
- My spouse should also be included as a member, as written below.
- I prefer to remain anonymous.

Signature and date

Signature and date

Print Name

Print Name

Date of Birth

Date of Birth

Address/City/State/Zip

Phone and Email