

DECLARATION OF INTENT

Thank you so much for your decision to include Trilogy as a beneficiary of your estate. We are deeply grateful for your generosity and commitment to our mission. We ask that you please complete the form below and include as much detail as you wish to share. Trilogy understands that all bequest provisions are revocable and that any intentions stated here are not binding on you or your estate.

I have named **Trilogy, Chicago, IL**, as a beneficiary of (check as many as apply):

- | | | |
|---|---|--|
| <input type="checkbox"/> My Last Will and Testament | <input type="checkbox"/> Retirement Account | <input type="checkbox"/> Life Insurance Policy |
| <input type="checkbox"/> Revocable Trust (Living Trust) | <input type="checkbox"/> Charitable Trust | <input type="checkbox"/> Donor Advised Fund |
| <input type="checkbox"/> Other (please specify) _____ | | |

My provision(s) names Trilogy, Chicago, IL as:

- | | | |
|--|--|---|
| <input type="checkbox"/> Primary Beneficiary | <input type="checkbox"/> Secondary Beneficiary | <input type="checkbox"/> Contingent Beneficiary |
|--|--|---|

I estimate that the total value of my gift to Trilogy through my estate will be ~ \$ _____

If/when this gift is received by Trilogy, it is my wish that the organization use my gift for the following purpose: General Purposes/Area of Greatest Need

Other: _____



Trilogy **may publish my name** as a member of your Legacy Society

- I am pleased to become a member of Trilogy's Legacy Society, but I wish to remain anonymous and **request that my name not be published** in connection with my bequest intention

Signature

Printed Name

Date

Signature

Printed Name

Date

To facilitate our ability to honor the intentions set forth above, we would greatly appreciate a copy of your Will or Trust (or appropriate sections thereof) for safekeeping in our confidential files.

Thank you.