

PLANNED GIFT RECEIPT

Beneficiary Designation

Receipt No:

Date:

DONOR INFORMATION

Donor Name:

Address:

Phone:

Email:

GIFT DESIGNATION DETAILS

Asset Type:

Administrator / Institution:

Account / Policy Number:

Designated Percentage (%):

Estimated Value (\$):

Specific Purpose / Designation:

The organization gratefully acknowledges the notification of the beneficiary designation outlined above. This document serves as an official acknowledgment of your planned gift intention. The final receipt for tax purposes, if applicable, will be issued to the estate or administrator upon the realization and transfer of the designated funds. We thank you deeply for your visionary support and commitment to our future.

Authorized Representative Signature

Title:

Date

Tax ID/ EIN _____

Please notify us of any subsequent changes to this beneficiary designation.

