

## Estate Gift Notification Form

It is helpful for River Edge Foundation to receive written documentation of your estate gift intention. This helps us recognize you appropriately, with your approval. The documentation also supports assuring your intentions are implemented. It is also useful, but not mandatory, for REF to receive copy(ies) of the relevant section(s) of your estate plan. Please include only information you feel comfortable sharing. All information is held strictly confidential.

### DONOR INFORMATION

Name(s): \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Birthday (Mo/Day/Yr): \_\_\_\_\_ Spouse Birthday (Mo/Day/Yr): \_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

### TRUSTEE OR EXECUTOR INFORMATION

Name(s): \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

### LEGACY SOCIETY INFORMATION

We are pleased to recognize you as a member of the Legacy Society in our annual report and other publications. Please indicate your recognition preference by checking one of the following:

Please list my/our name(s) as: \_\_\_\_\_

I/We wish to be anonymous.

One of the most effective ways of raising awareness about the importance of legacy gifts is to periodically profile our Legacy Society donors, sharing their story of why they support us.

I/we would be honored to be profiled in a future River Edge Foundation publication. Please contact me/us.

**BEQUEST INFORMATION**

River Edge Foundation is named as a beneficiary of (check all boxes that apply):  
(If willing to share the information, please include the current estimated value of the asset.)

- Sections of my will or trust \_\_\_\_\_
- Retirement Account/Plan\* \_\_\_\_\_
- Life Insurance Policy \_\_\_\_\_
- Investment or Financial Account\* \_\_\_\_\_
- Other asset\* \_\_\_\_\_

*\*NOTE: Please note many financial firms do not contact beneficiaries when the account holder passes away. Therefore, if you designate River Edge Foundation as a beneficiary of any account not covered by your will, your executor must notify REF so your gift can be realized when the time comes.*

**DESIGNATION**

- I request that funds be used to support critical River Edge needs.
- Additional information or directions regarding my bequest of which River Edge Foundation should be aware: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Signature\*:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Signature\*:** \_\_\_\_\_ **Date:** \_\_\_\_\_

*\*This form is non-binding.*

Thank you again for your continued support of recovery and inclusion. We appreciate your sharing your plans with us. We do track (anonymously) the total number of intended estate gifts, and this information helps us attract additional donors. Your notifying River Edge Foundation of your gift helps leverage even more support to make life better. We are so grateful for you!

**Please return this form to:**

River Edge Foundation  
175 Emery Highway  
Macon, GA 31317

Phone: (478) 803-7800  
Email: [philanthropy@river-edge.org](mailto:philanthropy@river-edge.org)