



KEEPER SOCIETY MEMBERSHIP FORM

GENERAL INFORMATION

Name: _____ Birthdate: _____
Name: _____ Birthdate: _____
Address: _____
City: _____ State: _____ Zip Code: _____
Telephone: _____ Email: _____

RECOGNITION

- Realizing that my/our example may encourage others to include the Pinky Swear Foundation in their estate plans, I/we hereby give permission for my/our name to be recognized on the Keeper Society roster in any Foundation communications as indicated below:

Please print your name(s) as you would like it to appear. The Keeper Society roster does not include gift amounts.

- I/We prefer to remain anonymous

WHY YOU'VE DECIDED TO JOIN THE KEEPER SOCIETY

Please tell us why you have decided to include the Pinky Swear Foundation in your estate plan. Feel free to use the lines below or attach a separate document: _____

OVER PLEASE

GIFT INFORMATION (strictly confidential)

I/we have designated the Pinky Swear Foundation as a beneficiary of a:

- | | |
|---|---|
| <input type="checkbox"/> Will or revocable trust | <input type="checkbox"/> Charitable remainder trust |
| <input type="checkbox"/> Savings account or CD | <input type="checkbox"/> Donor advised fund |
| <input type="checkbox"/> Life insurance policy or annuity | <input type="checkbox"/> Other (please specify) _____ |
| <input type="checkbox"/> Retirement account | |

The approximate value of my/our gift is \$_____ (optional.)

Please consider providing a copy or excerpt of your estate document that references your gift to the Pinky Swear Foundation. Doing so is completely optional, but greatly appreciated.

Please use my estate gift for the following purpose:

- Endowment
- Greatest Need
- Other (Please contact Development Staff to discuss details.)

PROFESSIONAL ADVISORS

Attorney/Firm: _____

Address: _____ Telephone: _____

City: _____ State: _____ Zip Code: _____

Financial Planner/Firm: _____

Address: _____ Telephone: _____

City: _____ State: _____ Zip Code: _____

Thank you for making a gift to benefit the Pinky Swear Foundation's future.
A copy of this form will be sent to you for your records. Welcome to the Keeper Society!

Signature: _____ Date: _____

Signature: _____ Date: _____