



To create an enduring source of funds forever
dedicated to the good of Bermuda

Confidential Statement of Bequest Intention

Thank you for your generous gift to the Bermuda Community Foundation through your estate plan and welcome to The Legacy Club!

Bequests from committed supporters like you will help us continue to build and grow the organisation, administer donor funds, and encourage other donors to set up a fund—all towards building an enduring source of funds for the continuing and changing needs of the third sector.

Name(s) _____
Year(s) of Birth _____
Address _____
Phone _____ Email _____

(You will receive occasional email updates from the Bermuda Community Foundation (BCF). We will not sell, rent, or exchange your email address.)

Have you designated that your gift be used by the BCF for a specific purpose? No (no further action necessary) Yes (please explain):

By making this gift, you become a member of The Legacy Club. In an effort to inspire others to make similar gifts, we like to list Legacy Club members in BCF from time to time. Indicate your preference below:

I would like to be listed as a Legacy Club member, which may include listing my gift within a dollar range

I prefer that my gift not be listed within a dollar range, but you may list my name as a Legacy Club member

I prefer to remain completely anonymous for this gift

Optional Information

We wish to assure you that all information on this statement of intention does not constitute a legal obligation and will not be legally binding in any way on you, your heirs, or your estate. Further, the Bermuda Community Foundation understands that the size of your future gift may be significantly different from the amount estimated below. If you make any changes to your provision, please notify us so that we may update our records.

Type of Bequest *If willing to disclose, please check all that apply and estimate the value of each gift in today's dollars. If you have named the BCF as a percentage beneficiary, please indicate the dollar value of the BCF's percentage.*

Will: \$ _____ Insurance policy: \$ _____
 Revocable living trust: \$ _____ Real estate (please describe below) \$ _____
 Charitable remainder trust: \$ _____ Securities: \$ _____ \$ _____
 Retirement plan/IRA/RRSP/Other: \$ _____ Other asset: \$ _____ \$ _____

Additional Information: _____

Is your bequest contingent? No Yes (If yes, please explain)

A contingent bequest comes to the Bermuda Community Foundation only if the other named beneficiaries do not survive you.

Signature(s) _____ Date _____

Questions? Contact us at **(441) 294-4959** or email mlv@bcf.bm. Please return this form to the Bermuda Community Foundation, Sterling House, 4th Floor, 16 Wesley Street, Hamilton HM 11, Bermuda or mlv@bcf.bm or fax to (441) 295-4897.