

Confidential Intention Form



Dear Donor,

We realize that many people who plan to support Hudson Community Foundation through their estate value privacy. However, by letting us know of your plans, we can show our gratitude and confirm that we can fulfill your stated intentions.

Please know that completing this form is non-binding — we understand that you may change your plans at any time. Know that all information you share with us is kept strictly confidential.

Amy Jordan
President
Hudson Community Foundation
49 East Main Street
Hudson, Ohio 44236
Phone: 330-655-3580
Email: amyjordan@myhcf.org

Planned Gift Notification – Confidential

Personal Information

Name : _____

Spouse/Partner: _____

Address: _____

City: _____ State: _____ Zip: _____

Date(s) of Birth: _____

Your Gift Intention



Please provide the following information and attach a copy of the documentation or appropriate language from your will or trust, if available. Please complete all that apply.

- I/We have included a bequest for HCF in my/our will or living trust.
- I/We have named HCF as a beneficiary of an asset:
 - Retirement Plan Bank, Investment, or Other Financial Account
 - Life Insurance Policy Other: _____

I/We have named HCF as a revocable /irrevocable (circle one) beneficiary of a charitable remainder trust.

The anticipated value of my/our gift is/will be approximately \$ _____ or % _____ of my/our estate. (If possible, please include a copy of the bequest language or other wording describing your planned gift.)

Please provide a general description of the gift provision (such as, asset to be donated if other than cash or securities, how gift is to be used, whether gift is to create an endowment, etc.):

Yes, you may include me/us in listings of planned gift donors.
Please indicate how you would like your name(s) to appear in our David Hudson Legacy Society listings.
(Please note the amount of your intended gift will not be published):

No, please do not include me/us in listings.

Signature(s):

Date: _____

Return form to:
Amy Jordan, President
Hudson Community Foundation
49 East Main Street
Hudson, Ohio 44236