

LEGACY GIVING

PLEDGE FORM

glenwood.org/planned-giving

**FOREVER
GLENWOOD**



Planned Giving Partners

Thank You for Your Commitment!

Thank you for including Glenwood, Inc. in your estate and legacy plans. By notifying us of your intentions, you help ensure that Glenwood can continue its mission for future generations.

This form is intended to document your current charitable intentions and is not a legally binding agreement.

• Donor Information

Full Name: _____

Date of Birth: _____ / _____ / _____ Phone Number: _____

Email: _____

Home Address: _____

City, ST Zip: _____

• Planned Gift Information

I/We have made provisions for a future gift to Glenwood through the following:

☐ Bequest in Will or Trust

☐ Retirement Plan (IRA, 401(k), 403(b), etc.)

☐ Life Insurance Policy

☐ Charitable Remainder Trust

☐ Charitable Lead Trust

☐ Other: _____

☐ Donor-Advised Fund

☐ Bank Account Transfer on Death (TOD)

☐ Payable-on-Death (POD) Account

☐ Real Estate

☐ Securities/Stock

Thank you for creating a lasting impact through your legacy gift to Glenwood!

• Estimated Gift

I/We wish to inform Glenwood of the following:

☐ A specific dollar amount of: \$ _____

☐ A percentage of my/our estate:

☐ The remainder (or residue) of my/our estate

☐ A specific asset or property, described below:

☐ Estimated current value (optional) \$

☐ I prefer not to disclose the estimated value of my gift.

• Forever Glenwood Recognition

How you would like your commitment recognized?

☐ I/We wish to remain anonymous

☐ My/our name(s) can be included in donor publications and recognition materials as indicated below:

• Gift Designation

I/We would like my/our gift to be used for:

☐ Unrestricted support to meet Glenwood's greatest needs

☐ I would like to discuss my gift designation with Glenwood

• Additional Information

I/We would like my/our gift to be used for:

☐ I have already included Glenwood, Inc. in my estate plans.

☐ I intend to include Glenwood, Inc. in my estate plans.

☐ I have attached supporting documentation.

☐ I would like someone from Glenwood to contact me regarding my planned gift.

Comments:

Please return form to:

150 Glenwood Lane
Birmingham, AL 35242

Email: ctheriot@glenwood.org

For More Information:

Chris Theriot, DBA, CFRE
Vice President of Development

Direct Line: (205) 795-3376

 glenwood.org/planned-giving

Glenwood Information

Legal Name:

Glenwood, Inc.

Address:

150 Glenwood Lane
Birmingham, AL 35242

Federal Tax ID (EIN):

23-7396710