



## Legacy Society Enrollment Form

The Heritage Christian Services (HCS) Legacy Society honors and recognizes the generosity of those who have chosen to leave a legacy to HCS through their estate or financial planning. A legacy gift to HCS will benefit future generations of children and adults with intellectual and developmental disabilities—helping them to fulfill lives of endless possibility.

The information you provide on this form will ensure your legacy gift will be used as intended and enable us to keep you informed of any legal and/or tax changes that may affect your gift. This is not a legally binding document and can be changed or revoked at any time.

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

Mailing Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone(s): \_\_\_\_\_ Email(s): \_\_\_\_\_

Birth Date(s): \_\_\_\_\_

I/We have formalized my/our legacy plans and have chosen to support HCS through:

- Will or Living Trust  Charitable Gift Annuity  Life Insurance Beneficiary  Gift of Real Estate  
 Charitable Trust  Retirement Plan Beneficiary  Other, Please Specify: \_\_\_\_\_  
 This gift is a percentage \_\_\_\_%  This gift is a specified amount \$ \_\_\_\_\_  Residuary Beneficiary

Please tell us more about your gift intentions:

- I/We have planned this gift in honor/memory of someone. Please specify who: \_\_\_\_\_  
 Yes, you may list my/our name(s) publicly as Legacy Society member(s). Please list how you would like to be recognized: \_\_\_\_\_  Please keep my/our legacy gift anonymous

Your Signature(s): \_\_\_\_\_ Date: \_\_\_\_\_

Signature 2: \_\_\_\_\_ Date: \_\_\_\_\_

For our records, we would appreciate receiving a copy of the relevant pages of your bequest or trust provision that refers to Heritage Christian Services Foundation (Tax ID #16-1318395) so that we may properly record and preserve your gift intentions. All materials provided will be kept confidential.

Please return this form and accompanying documents to Danielle Pierleoni, Legacy and Leadership Giving Manager, at: Heritage Christian Services Foundation, 275 Kenneth Dr Ste 100, Rochester, NY 14623. Please contact Danielle with any questions: (585) 340-2068 or [Danielle.Pierleoni@HeritageChristianServices.org](mailto:Danielle.Pierleoni@HeritageChristianServices.org).