



Confluence Society Planned Giving Notice of Intention

Paddle Antrim invites you to become a member of the Confluence Society, our program for donors who have made a planned gift to benefit Paddle Antrim. To become a member, please fill out this confidential form and send it to the address below. We value your future gift and want to properly thank you and acknowledge your thoughtfulness!

- I understand that listing this gift in donor honor rolls may be an incentive for others to give, and I am willing to be publicly acknowledged.
- I prefer not to be listed or acknowledged publicly.
- I prefer to remain anonymous and request no contact or acknowledgement regarding this gift.

RETIREMENT PLANS AND IRAs

I have designated Paddle Antrim as a _____% beneficiary of my IRA or other retirement account. My future gift has a current estimated value of \$_____.

I have designated a specific gift of \$_____ for Paddle Antrim from my IRA or other retirement account.

I have designated Paddle Antrim as a _____% beneficiary of my insurance policy. My future gift has a current estimated value of \$_____.

WILLS AND ESTATES

My Will/Trust was signed on: _____

My Will/Trust provides that _____% shall be bequeathed to Paddle Antrim. As of today's date, I *estimate* that the value of this provision in my estate plan would be approximately \$_____.

My Will/Trust provides that a specific gift of \$_____ shall be bequeathed to Paddle Antrim.

My Will/Trust provides that certain items of real or personal property shall be bequeathed to Paddle Antrim. These items are as follows:

_____.

DESIGNATION

- My future gift is unrestricted.
 - I direct Paddle Antrim to use my future gift for a specific purpose. The specific purpose is as follows:
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Recognition

For recognition purposes, please list my/our name(s) as:

Signature: _____ Date: _____

Address: _____

Email: _____ Phone: _____

This is a confidential record. I understand that I am not making a legal or binding commitment upon my estate by submitting this Beneficiary Designation Form. Further, Paddle Antrim understands and acknowledges that the size of my future gift may be significantly different from the amount estimated above for the purposes of valuation.

Return completed form: Paddle Antrim, Attn: Planned Giving, PO BOX 323, Elk Rapids, MI 49629