

# DECLARATION OF BEQUEST INTENTION

## Donor Documentation Form



If you have included a gift for Planned Parenthood of Montana in your estate plans, please complete the steps below.

**01**

### Type of bequest. My/our future gift is from:

- Will / Living Trust
- Bank, Brokerage, or Other Financial Account
- IRA / Retirement Account
- Other (please specify) \_\_\_\_\_
- Charitable Remainder Trust

**02**

### Amount of bequest. My/our future gift is:

- Estimated to be worth \$ \_\_\_\_\_
- The specific amount of \$ \_\_\_\_\_
- An amount that I/we wish to keep private

**Planned Parenthood of Montana understands that all bequest provisions are revocable and that any intentions stated here are not binding on you or your estate.**

**03**

### Contact information:

NAME

ADDRESS (CITY, STATE, ZIP)

PHONE

EMAIL

**04**

### Recognition. I/We would like to be listed as follows:

NAME(S)

I/We prefer to remain anonymous.

SIGNATURE

DATE

Please fill out form and return to:

**Planned Parenthood of Montana**  
1116 Grand Ave, Suite 201, Billings, MT 59102