

BookSmiles



Statement of Deferred Gift Provision

BookSmiles is extremely grateful for the many friends and supporters who have included BookSmiles in their estate plans. While it is recognized that values are subject to change and that circumstances may alter your plans, your *Statement of Deferred Gift Provision* will allow the staff at BookSmiles to better plan for the future by having a knowledge of your intended support.

Name: _____

While reserving the right to alter my/our plans at any time and with the understanding that values are subject to change, I/we have executed a valid deferred gift provision in my/our estate for BookSmiles. I/we conservatively estimate the current value of the provision to be approximately \$_____.

My _____ specifies the gift to be used for _____.
(estate document—will, trust, etc.) (BookSmiles unrestricted fund, book purchases, etc.)

Gift Type

Bequest

- Bequest in a will (revocable)
- Bequest in a living trust
 - Right to change beneficiaries
 - BookSmiles is an irrevocable beneficiary

Charitable Remainder Trust

- Trust (BookSmiles is not the trustee)
 - Right to change beneficiaries retained
 - BookSmiles is an irrevocable beneficiary

Beneficiary Designation Form

- Retirement Plan (please provide copy of statement)
 - BookSmiles is primary beneficiary
 - BookSmiles is contingent beneficiary

Life Insurance

- BookSmiles is primary beneficiary
- BookSmiles is contingent beneficiary

Other (please describe): _____

This document does not bind you or your estate. By signing this form, you are acknowledging your current estate plans as they pertain to BookSmiles.

Signature: _____

Signature: _____

Date: _____

Date: _____