



Legacy Giving

Thank you for including CVCOA in your legacy giving. This form will help you document your intentions, which are in no way binding or irrevocable.

Your giving intention helps CVCOA deliver on our mission to support Central Vermonter to age with dignity and choice while helping you ensure your wishes create a legacy.

If you decide to make a bequest, we encourage you to share the information with us. Your plans remain confidential and flexible while allowing us to plan for the future.



Have a Bequest?

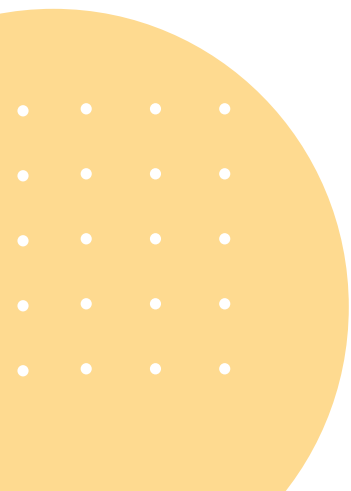
Document it in three steps:

1. Complete Legacy Gift Intent Form;
2. Gather copies of related documents;
3. Mail to CVCOA.

Sample Bequest Language:

"I give, bequeath, and devise to Central Vermont Council on Aging, a 501(c)3 nonprofit organization established by law at 59 N. Main Street, Suite 200, Barre, VT 05641, whose Federal Tax ID number is 03-0276104 [here follows the dollar amount or percentage of the gift, or an accurate description of the securities, insurance policies, retirement funds, or the amount or percentage of the residual estate, or the real estate or other assets given]."

Contact Leanne Hoppe, Director of Philanthropy and Communications, at 802-476-2662 to speak about your wishes and how we can honor your gift.





Legacy Gift Intent Form

Contact Information:

First Name

Last Name

Phone

I have made a provision(s) for CVCOA in my estate plan as follows:

- Outright bequest in my will \$
- Life insurance policy \$
- Revocable living trust with CVCOA as beneficiary \$
- Life income plan
(Charitable Trust, Charitable Gift Annuity) \$
- Retirement plan
(pension, IRA, Keogh, ROTH) \$
- Other \$

My gift will be unrestricted restricted for:

Please include with this form related documents (i.e. copy of your will, insurance beneficiary, trust agreement, etc.) which further describes the nature of the provision(s).

Check here if you would like your gift to be anonymous.

Please indicate how you would like your name(s) to appear for recognition purposes.