This form compiles necessary information for Harbor Interfaith Service’s appropriate administration of your charitable deferred gift. This confirmation of deferred gift form is a record of your intent, a donor-approved reference for future use. Thank you for your gift to support Harbor Interfaith Services.

**This is not a binding legal document.** Your signature verifies accuracy of information on the date signed. Details and monetary value of deferred gifts change over time; if possible please inform Harbor Interfaith Services of substantive changes.

### Type of Gift (Check all that apply)

- [ ] Will Bequest (circle type)
  - [ ] Specific Amount
  - [ ] Specific Percentage
  - [ ] Residual
  - [ ] Contingent
  - [ ] Life Insurance
  - [ ] Life Insurance Beneficiary
  - [ ] Revocable Trust
  - [ ] Charitable Gift Annuity
  - [ ] Charitable Remainder Trust
  - [ ] Deferred Gift Annuity
  - [ ] Charitable Remainder Annuity Trust
  - [ ] Other
  - [ ] Retirement Account Designation
  - [ ] Charitable Legacy Fund (donor-advised)
  - [ ] Other

**Good Faith Estimate of Gift Value** $________________________

### Gift Purpose

- [ ] My/our gift may be used for Harbor Interfaith Service’s greatest needs.
- [ ] My/our gift is designated for the following purpose(s) __________________________

### The Legacy Society

Because of your charitable intentions, you will be included as a member of The Legacy Society. Harbor Interfaith Services created the Society to recognize donors who choose a deferred gift to support the organization in upholding its mission. You will join other donors who have established similar deferred gifts. Your name will be published among other Legacy Society listings in Harbor Interfaith publications so that others may be inspired to follow your example. If you would prefer to remain anonymous (and not be listed), please check the following:

- [ ] No, I/We do not wish to be listed on the Legacy Society in Harbor Interfaith publications. We prefer to remain anonymous. (It is the fiduciary responsibility of Harbor Interfaith Services to ensure our donor’s confidentiality).