



## CUPOLA LEGACY SOCIETY

# Planned Giving Declaration of Intent

Thank you for your intention to include the Friends of the Cabildo in your estate plans. Please complete this form with as much information as you are willing to share so we may accurately document your intention. Information about your gift will remain confidential; if your gift intention is changed or cancelled, please notify us.

Planned gifts should name the 501(c)3 nonprofit organization as follows:  
Friends of the Cabildo, Inc., Tax ID: 72-6027414.

NAME(S) (As you would like it to appear in recognition):

\_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_

STATE \_\_\_\_\_ ZIP \_\_\_\_\_

PHONE \_\_\_\_\_

EMAIL \_\_\_\_\_

### Gift Details

- Bequest in Will or Living Trust
- Beneficiary of Retirement Account
- Beneficiary of Life Insurance Policy
- Ownership of Life Insurance Policy
- Other (please describe):  
\_\_\_\_\_  
\_\_\_\_\_

**The estimated amount of this gift is \$** \_\_\_\_\_

- I wish for this gift to benefit the FOC where it is most needed
- I would like for this gift to be used for:  
\_\_\_\_\_
- You have permission to list me as a member of the Cupola Legacy Society.
- I wish to remain anonymous and not be listed in the Cupola Legacy Society.

### Additional Information:

Please list contact information for any individuals or organizations related to this gift (e.g. Family Members, Executors, Trustees, Retirement or Insurance Administrators. Please list name, address, phone, and email where possible).

CONTACT NAME \_\_\_\_\_ RELATIONSHIP \_\_\_\_\_

ADDRESS \_\_\_\_\_ CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_

PHONE \_\_\_\_\_ EMAIL \_\_\_\_\_

If possible, please include documentation pertaining to your gift, e.g. copies of will or trust, beneficiary designation form.

DONOR SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_

DONOR SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_

Please return to: Jason Strada, Executive Director  
701 Chartres Street · New Orleans LA 70116 · 504.523.3939 · [jason@friendsofthecabildo.org](mailto:jason@friendsofthecabildo.org)