



## Celebration of Intent to Bequest Instructions

*Congratulations* on your decision to include Silver Key Senior Services in your estate plans. We are honored by the confidence you have placed in Silver Key and are resolute in making sure seniors in the Pikes Peak region have the greatest possibility of living safe, healthy lives that celebrates their dignity and independence

This document has been created to help you fulfill your intent to bequest. Your next steps are:

### **Step One:**

Please read and complete; sign and date the Celebration of Intent Form. Then, save and file with your estate planning records.

### **Step Two:**

Please read and complete; date and sign the "For Silver Key version" of the Celebration of Intent form. Then, either mail to: 1625 S. Murray Blvd, Colorado Springs, Colorado 80916 **OR** scan and email scanned copy of the "For Silver Key version" to [development@silverkey.org](mailto:development@silverkey.org).

### **Step Three:**

Celebrate the legacy your intentional planning and follow through will have for seniors in the Pikes Peak region for generations to come.

Please proceed to the attached forms to provide the information requested.



## Celebration of Intent to Bequest

For Your Estate Planning Records

On behalf of the Board of Directors, staff, volunteers, and the clients we serve, thank you for including Silver Key Senior Services in your estate plans. We celebrate your decision to include Silver Key as part of your philanthropic goals.

Donor Name(s) \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Birth Date \_\_\_\_ / \_\_\_\_ / \_\_\_\_ (mm/dd/year) Spouse Birth Date \_\_\_\_ / \_\_\_\_ / \_\_\_\_ (mm/dd/year)

Primary and Alternate Email Address \_\_\_\_\_

Primary Contact Phone \_\_\_\_\_ Alternate Phone \_\_\_\_\_

### Recognition of Your Gift: We want to celebrate the legacy you are entrusting to us.

Yes, I/We plan to include Silver Key in our estate plans.

I/We understand that this bequest automatically qualifies us for enrollment in the **Silver Lining Alliance** and agree to have my/our name(s) listed in this society

**OR**

I/We wish to remain anonymous need of Silver Key

I/We have provided OR will provide a copy of the portion of the will or other instruments that pertains to our gift to Silver Key

I/We wish to direct my/our support to unrestricted funds to be used for the greatest

**OR**

I/We wish to direct my/our support to a specific purpose to be discussed: (Please describe)

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We are grateful to serve and thank you. We understand that this document is non-binding and that you may modify and/or revoke your bequest at any time. For questions and additional help or sample language, please visit [Silverkey.org/ways-to-give](http://Silverkey.org/ways-to-give) and select: Planned Giving, Wills and Estate Planning or connect with us at [development@silverkey.org](mailto:development@silverkey.org) or 719-884-2300.

Donor Name(s) \_\_\_\_\_

(Please print)

Donor Signature(s) \_\_\_\_\_

Date \_\_\_\_\_



## Celebration of Intent to Bequest For Silver Key Records

On behalf of the Board of Directors, staff, volunteers, and the clients we serve, thank you for including Silver Key Senior Services in your estate plans. We celebrate your decision to include Silver Key as part of your philanthropic goals.

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Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Birth Date \_\_\_\_ / \_\_\_\_ / \_\_\_\_ (mm/dd/year) Spouse Birth Date \_\_\_\_ / \_\_\_\_ / \_\_\_\_ (mm/dd/year)  
Primary and Alternate Email Address \_\_\_\_\_  
Primary Contact Phone \_\_\_\_\_ Alternate Phone \_\_\_\_\_

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Donor Signature(s) \_\_\_\_\_  
Date \_\_\_\_\_