



## Cornerstone Society Membership Form

The greatest legacies begin at home. We're honored by your intention to include Beacon as part of your legacy. Thank you for your commitment to a future where all our neighbors – for generations to come – have a home.

To indicate that you have made provisions for a planned or deferred gift, please complete the Membership Form below with as much detail as you are willing to share. By sharing this information, you can help ensure that we properly recognize your donation, plan for future needs, and manage your gift in accordance with your wishes. Your information will be kept secure and confidential in our files and not shared without your permission.

### Contact Information:

First name(s) \_\_\_\_\_ Last name(s) \_\_\_\_\_ Birthdate \_\_\_\_\_  
Home address \_\_\_\_\_ City \_\_\_\_\_ State/Zip \_\_\_\_\_  
Home Phone \_\_\_\_\_ Mobile phone \_\_\_\_\_  
Email \_\_\_\_\_  
Congregation (if applicable) \_\_\_\_\_

### Beacon Interfaith Housing Collaborative has been included in my/our estate planning by naming:

- Beacon in my/our Will or Revocable (Living) Trust for \_\_\_\_\_ % or \$ \_\_\_\_\_.
- Beacon as  primary or  contingent beneficiary of:
  - Retirement account at \_\_\_\_\_ for \_\_\_\_\_ %
  - Insurance policy at \_\_\_\_\_ for \_\_\_\_\_ %
  - Donor advised fund at \_\_\_\_\_ for \_\_\_\_\_ %
  - Other (Annuity, Remainder/Lead Trust, Real Estate, etc.), please specify: \_\_\_\_\_

*(Beacon does not use your estimated gift amount in annual budget planning, but approximate information helps us imagine long-term goals)*

### My/our intended gift is:

- Undesignated or unrestricted
- Designated for the purpose of \_\_\_\_\_
- Other \_\_\_\_\_

*(If the need you have chosen above no longer exists at the time of your gift, Beacon will designate the funds for a similar or related purpose)*

**Will you allow us to list your name as a member of our Cornerstone Society?** Your public commitment as a Cornerstone Society member inspires others to follow your lead and consider Beacon in their planned giving.

- Yes, please list my/our name(s) as \_\_\_\_\_
- No, I/we prefer to remain anonymous.

**Your Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

*Beacon Cornerstone Society listings will never reference your intended gift allocations or amount. We understand that this amount can change over time, or may be revoked. We look forward to keeping you up to date about our work and our plans for the future, which your commitment makes possible.*

[www.beaconinterfaith.org](http://www.beaconinterfaith.org)

Questions? Contact Elodie Lee: (651) 377-8152 or Lisa Zellmer: (651) 377-8156