



**Estate Gift Notification Form**

To formalize your bequest or estate gift to Second Wind Fund, we simply need written documentation of your intention. It is useful, but not mandatory, for Second Wind Fund to receive a copy of the relevant sections(s) of your will. Please feel free to include only the information that you are comfortable sharing. This information will be kept strictly confidential and we will recognize your gift as you prefer.

**DONOR INFORMATION**

Name(s): \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip code: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

**TRUSTEE OR EXECUTOR INFORMATION**

Name(s): \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip code: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

**BEQUEST INFORMATION**

Second Wind Fund is named as a beneficiary of (describe all that apply):

\_\_\_ Sections of my will or trust: \_\_\_\_\_

\_\_\_ Retirement Account / Plan: \_\_\_\_\_

\_\_\_ Life Insurance Policy: \_\_\_\_\_

\_\_\_ Investment or Financial Account: \_\_\_\_\_

\_\_\_ Other Asset: \_\_\_\_\_

*\*Please include Second Wind Fund's Tax ID #73-1701536 in all legal documentation. If you are comfortable doing so, include the current estimated value of the asset above.*

**DESIGNATION**

\_\_\_ I request that funds be used for the area of greatest need.

Additional information or directions regarding my bequest that Second Wind Fund should be aware of:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**RECOGNITION OF BEQUEST**

Please indicate your recognition preference by checking one of the following:

Please list my / our name(s) as: \_\_\_\_\_

Provide additional instructions on your preference for gift recognition:

\_\_\_\_\_  
\_\_\_\_\_

or

I / We wish to remain anonymous.

Signature\*: \_\_\_\_\_

Date: \_\_\_\_\_

Signature\*: \_\_\_\_\_

Date: \_\_\_\_\_

*\*This form is non-binding. Second Wind Fund understands that bequests are revocable and that your estate plans may change.*

Please return this form to:

Second Wind Fund

13701 West Jewell Ave. #251

Lakewood, CO 80228

Attn: Chris Weiss – Development Director

cweiss@thesecondwindfund.org