



## NorthWest Senior & Disability Services

*Serving Clatsop, Marion, Polk, Tillamook and Yamhill counties.*

A charitable bequest is a distribution from your estate to a charitable organization through your last will and testament. There are different kinds of bequests. For each, you must use very specific language to indicate the precise direction of your assets, and to successfully carry out your final wishes.

You can leave your legacy by making a gift from your estate to benefit NorthWest Senior and Disability Services Senior Meals and Meals on Wheels Program. Estate planning contributions provide important and lasting support in making a difference in the lives of seniors.

Senior Meals and Meals on Wheels serve nutritious meals through a network that relies on a combination of public funding and community support. For many programs this funding falls short. Meals are currently delivered to seniors in 40 communities in Clatsop, Marion, Polk, Tillamook and Yamhill counties.

**We provide more than a meal.** A friendly visit with the volunteer driver is often the only interaction some homebound seniors have during the day. Besides providing meals, our Senior Meals Driver provides a welfare check, which keeps seniors safe and living at home with dignity and independence.

If you would like to notify NorthWest Senior and Disability Services of a planned gift provision you have already made, simply complete and return the Letter of Intent on the reverse side. For more information of planned giving opportunities, contact Senior Meals and Meals on Wheels at the office number, (503) 304-3474.

The information provided herein is for informational purposes only, and is not intended to be legal or tax advice. NorthWest Senior and Disability Services recommend that you consult with a qualified estate planning attorney when drafting your will or other estate planning documents.



# NWSDS Confidential Letter Of Intent

Name: \_\_\_\_\_

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

\_\_\_\_\_

Phone: \_\_\_\_\_ E-mail: \_\_\_\_\_

I am pleased to make known my provisions for enhancing the future life of NorthWest Senior and Disability Services Senior Meals and Meals on Wheels participants. My gift is in the form of:

\_\_\_\_\_ A Bequest

NorthWest Senior and Disability Services Senior Meals and Meals on Wheels is named as a beneficiary in my will dated \_\_\_\_\_

I estimate today's value of the bequest provision to be \$ \_\_\_\_\_

The provision is made with the following intention:

_____ Life Insurance Designation	Estimated Value: _____
_____ Gift of Retirement Plan Assets	Estimated Value: _____
_____ Gift of Pooled Income Fund	Estimated Value: _____
_____ Gift Annuity Estimated Value:	Estimated Value: _____
_____ Charitable Trust	Estimated Value: _____
_____ Living Trust	Estimated Value: _____

\_\_\_\_\_ I have provided for NorthWest Senior and Disability Services Senior Meals and Meals on Wheels Program in a manner different from above (Please describe)

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

