



1974 Society Enrollment Form

The 1974 Society was created to recognize those who intend to make a planned gift to The Relatives by way of a will, trust, beneficiary designation or other giving arrangement. By their generosity, these special people have shown commitment to the work and future of The Relatives and will be remembered in perpetuity for their support. This form is non-binding and does not constitute a legal promise to make a gift. We understand that most estate gifts are revocable, and your estate plans may change. We are asking for the information on this form for our recording keeping purposes only and any information provided will not be shared and will be kept in strict confidence.

Date _____

Name(s) _____

Address _____

Mobile _____

Email _____

Date of Birth(s) _____

Please print your name(s) below exactly as you wish them to appear on donor lists and/or any documents or publications as it relates to the 1974 Society so that we may acknowledge your gift according to your wishes. If you choose, you may also indicate that you would like to remain anonymous.

Contact us:

Caitlin E. Donley, CFRE, Director of Development

2919 Freedom Drive, Charlotte, NC 28208

704-501-8253 or cdonley@therelatives.org

Tax ID: 56-1082022

The Relatives is included as a beneficiary in the following (check all that apply):

- Retirement Account _____
- Trust
Date of Trust _____
Trustee Contact Information _____

- Will
Date of Will _____
Trustee Contact Information _____

- Insurance Policy
Name of Insurance Company _____
- Other _____

Include notes on any of the above if applicable:

The Relatives is a:

_____ percentage amount beneficiary

_____ dollar amount beneficiary

_____ residual amount beneficiary

The estimated value is _____ (estimated values are not required, will be held in strict confidence, and will not be publicized).

Please submit any pertinent pages of your will or trust where The Relatives is mentioned.

As an expression of my commitment to improving the lives for youth and young adults in the Charlotte-Mecklenburg community, I declare my intention to make a bequest to The Relatives.

Signature(s) _____