



## 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 record 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 Philanthropy

2219 Freedom Drive, Charlotte, NC 28208

704-501-8253 or [cdonley@therelatives.org](mailto:cdonley@therelatives.org)

Tax ID: 56-1082022

The Relatives (EIN: 56-1082022) is included as a beneficiary in the following (check all that apply):

- Retirement Account \_\_\_\_\_
- Donor Advised Fund \_\_\_\_\_
- Trust  
Date of Trust \_\_\_\_\_  
Contact Information \_\_\_\_\_
- Will  
Date of Will \_\_\_\_\_  
Contact Information \_\_\_\_\_
- Insurance Policy  
Name of Insurance Company \_\_\_\_\_
- Other \_\_\_\_\_

Include notes on any of the above or financial/legal contact 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) \_\_\_\_\_