



1974 Society Enrollment Form

The 1974 Society was created to recognize those who intend to make a planned gift to The Relatives. 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.

Name(s) _____

(as you wish them to appear on donor lists and/or publications related to the 1974 Society)

I wish to remain anonymous.

Address _____

Mobile _____ Email _____

Date of Birth(s) _____

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

- | | |
|--|---|
| <input type="checkbox"/> Retirement Plan/IRA | <input type="checkbox"/> Bequest through a Will |
| <input type="checkbox"/> Donor Advised Fund | <input type="checkbox"/> Insurance Policy |
| <input type="checkbox"/> Trust | <input type="checkbox"/> Other _____ |

The Relatives is a:

_____ percentage amount beneficiary

_____ dollar amount beneficiary

_____ residual amount beneficiary

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) _____ Date _____

Optional - Please submit any pages of your will or trust where The Relatives is mentioned or pertinent notes/contact information on any of the above. The estimated value is _____.

Return this form to: Caitlin E. Donley, CFRE, Director of Philanthropy
2219 Freedom Drive, Charlotte, NC 28208; 704-501-8253 or cdonley@therelatives.org
Tax ID: 56-1082022

Completion of this form is a notification of intent only and not intended to be legally binding. Please discuss your planned giving intentions with your professional financial and legal advisors. The Relatives is a tax-exempt nonprofit organization recognized by section 501 (c)3 of the internal Revenue code. Contributions are tax deductible to the extents allowed by law.