



SWEDISH

Foundation

SWEDISH LEGACY PARTNERS

Confidential Membership Form

Swedish Legacy Partners include those friends who have decided to pass on their legacy by including a gift to Swedish in their estate plans. We thank you for taking a few minutes to share the following information with us so that we may accurately document your gift intentions.

Name _____

Address _____

City _____ State _____ Zip _____

Phone (home) _____ (cell) _____

Email _____ Birthdate(s) _____

1. Please indicate how you have provided for Swedish in your financial and estate planning:
- A gift in my will or living trust
 - A charitable remainder trust
 - A charitable gift annuity
 - A charitable lead trust
 - Beneficiary designation – IRA or other retirement plan
 - Beneficiary designation – insurance policy
 - Other: _____

2. The intended use of this gift is to benefit Swedish through:
- Unrestricted support (greatest needs of Swedish)
 - Restricted support (e.g., an endowed fund or a gift restricted to the use of a particular clinic, physician or service area). Describe below:

3. To accurately document your gift intentions, please provide a copy of your will, living trust or beneficiary designation.
- A copy of my will, living trust or beneficiary designation is enclosed. Please contact me to discuss.

4. The current estimated value of my gift is:*
- *Your willingness to share the estimated value of your estate gift helps Swedish plan for the future. This information in no way obligates you or your estate and is kept confidential.
- | | |
|--|---|
| <input type="checkbox"/> Up to \$29,999 | <input type="checkbox"/> \$500,000 – \$999,999 |
| <input type="checkbox"/> \$30,000 – \$99,999 | <input type="checkbox"/> \$1,000,000 – \$2,999,999 |
| <input type="checkbox"/> \$100,000 – \$249,999 | <input type="checkbox"/> \$3,000,000 or more |
| <input type="checkbox"/> \$250,000 – \$499,999 | <input type="checkbox"/> Estimated gift amount:
\$ _____ |

5. Your commitment to Swedish is so important and we would like to know more about you.

a) Is there a particular caregiver who had a positive impact on you or your family?

b) What inspired you to include Swedish in your estate plans?

Thank you for being a Swedish Legacy Partner! Let us know if we may recognize your generosity and send you periodic communications about estate planning.

I/we give permission to be recognized as Swedish Legacy Partners.

Mail your completed survey to:
Swedish Foundation
ATTN: Ryan Egge
747 Broadway, Seattle WA 98122
Or you can email it to ryan.egge@swedish.org.

Questions? Please contact:
Ryan Egge
Sr. Director, Principal Gifts and Planned Giving
206-386-2711 or ryan.egge@swedish.org
swedish.giftplans.org