CONFIDENTIAL BEQUEST INTENT FORM

The Toby Keith Foundation • 818 N.E. 8th St., OKC, OK 73170 • Juliet@tobykeithfoundation.org/405-693-0991

Thank you for your interest in supporting **The Toby Keith Foundation and OK Kids Korral** through your estate plans. This form helps us understand your wishes, ensure your gift is directed exactly as you intend, and properly recognize your generosity.

Please note: This form is confidential and serves as a statement of current intent. It is entirely non-binding and does not constitute a legal debt against your estate.

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1. DONOR INFORMATION

Primary Donor Name: _____

Date of Birth: _____

Co-Donor Name (if applicable): _____

Address: _____

City/State/Zip: _____

Phone: _____ **Email:** _____

2. LEGAL / FINANCIAL ADVISOR INFORMATION

(Optional: Provide the details of the professional managing your estate planning)

Advisor Name: _____ **Firm Name:** _____

Phone: _____ **Email:** _____

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3. GIFT STRUCTURE & ESTIMATED VALUE

I/We have made provisions for **The Toby Keith Foundation** in my/our estate plans via the following mechanism (please check all that apply):

- ☐ **Specific Bequest:** A specific cash amount or asset.
  - *Estimated Value:* $ _____
- ☐ **Residuary Bequest:** A percentage of the remainder of the estate.
  - *Estimated Percentage:* _____% | *Estimated Value:* $ _____
- ☐ **Contingent Bequest:** A gift realized only if other beneficiaries pass away first.
  - *Estimated Value:* $ _____
- ☐ **Beneficiary Designation:** Naming the organization as a beneficiary of a Life Insurance Policy, IRA, 401(k), or Bank Account.
  - *Estimated Value:* $ _____
- ☐ **Other Asset Type:** (e.g., Real Estate, Stocks, Trust, Business Interests)
  - *Description:* _____

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4. GIFT PURPOSE & DESIGNATION

Please indicate how you would like **[Your Organization Name]** to direct your future gift:

- ☐ **Unrestricted Support:** To be used where the need is greatest at the time the gift is received.
- ☐ **Restricted Support:** To support a specific program, fund, or initiative.
  - *Specify Program/Fund:* _____
- ☐ **Endowment Fund:** To be invested permanently, with annual payouts supporting general operations of OK Kids Korral.

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5. RECOGNITION & PUBLICITY

We enjoy honoring our legacy donors, but we completely respect your privacy. Please choose one:

- ☐ **Public Recognition:** You may publish my/our name(s) in donor listings, annual reports, and invite me/us to legacy society events.
  - *Please print name(s) exactly as they should appear:*

    _____
- ☐ **Anonymous:** Please keep this gift completely anonymous. Do not publish my name.

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6. CONFIRMATION & NON-BINDING DISCLAIMER

*By signing below, I/we express my/our current intent to provide for **[Your Organization Name]** in my/our estate plans. I/we understand that this declaration is non-binding, does not create a legal obligation, and may be altered, updated, or revoked by me/us at any time.*

Donor Signature: _____ **Date:** _____

Co-Donor Signature: _____ **Date:** _____
