

Lakeside Chautauqua Foundation
236 Walnut Avenue
Lakeside, Ohio 43440
www.lakesideohio.com/giving
(419) 798-5396

BEQUEST NOTIFICATION
Confidential

Please complete and return the information below and mail to: Gretchen Colon, V.P. of Advancement, Lakeside Chautauqua Foundation, 236 Walnut Avenue, Lakeside, Ohio 43440. For questions, please contact Gretchen at (419) 798-5394 or gcolon@lakesideohio.com.

- I/ We want to support the mission of Lakeside Chautauqua Foundation with a legacy gift and I/we have:

(Please check any that apply. We realize that many people prefer not to reveal such personal information. Feel free to tell us only what you are comfortable sharing. You can rest assured that your information is kept confidential with Lakeside Chautauqua Foundation.)

BEQUEST

- I included a bequest for Lakeside Chautauqua Foundation in my/our will or living trust.

I/We anticipate that the approximate value of my/ our bequest will be \$_____

BENEFICIARY DESIGNATION

- Included Lakeside as a beneficiary of an asset

The asset of which Lakeside Chautauqua Foundation is a beneficiary is a: (check all that apply).

Retire plan(s): _____
Financial or investment account (s): _____
Life insurance policy (ies): _____
Other asset(s): _____

I/We anticipate that the approximate value of my/ our beneficiary designation(s) will be \$_____

CONTACT INFORMATION

My/ Our Name(s)

First Name _____ Last Name _____

Address _____ City, State, Zip _____

Phone _____ Email _____

Name of Executor or Trustee

First Name _____ Last Name _____

Address _____ City, State, Zip _____

Phone _____ Email _____

This form is non-binding and does not constitute a legal promise of any future donation to Lakeside Chautauqua Foundation and understand that your estate plans may change.

FOUNDERS SOCIETY

The founders of Lakeside held great dreams for this enriching Chautauqua community more than 135 years ago. Many Lakesiders recognize how gift planning will help achieve great dreams like those of our Lakeside founders. Your commitment will enrich the Lakeside experience for future generations. The Founders Society was formed to honor those who recognized the importance of investing in Lakeside, and have included Lakeside in their estate planning. Lakeside's future relies on planned gifts made today, that will provide for an enriching Chautauqua experience for the future.

I/we would like to be recognized in the Founders Society for my/our gift planning to Lakeside Chautauqua Foundation.

I/we would like our name to appear in print: _____