



Mentors for Tomorrow Legacy Society

Legacy Declaration Form

Thank you for including Bolder Options in your legacy plans

By completing this form, you help us plan for the future and allow us to properly recognize and thank you for your generosity. All information is kept strictly confidential and creates no legal obligation.

YOUR INFORMATION

Name: _____

Spouse/Partner Name (if applicable):

Email: _____

Phone: _____

Mailing Address:

ABOUT YOUR LEGACY GIFT

Type of Gift (check all that apply):

- ☐ Bequest in will or trust
- ☐ Beneficiary designation (retirement account, life insurance, etc.)
- ☐ Charitable remainder trust or gift annuity
- ☐ Other (please specify):

Additional Details (optional):

Please share any additional information about your gift that you're comfortable sharing (for example: specific percentage, asset type, or purpose designation):

Note: You are not required to share the amount of your gift. This information helps us plan for the future, but we understand if you prefer to keep these details private.

Would you like to share an estimated value of your gift?

- ☐ Yes, estimated gift value: \$
 - ☐ No, I prefer to keep this information private
-

RECOGNITION PREFERENCES

How would you like to be recognized?

- ☐ Please recognize me/us as a Mentors for Tomorrow Legacy Society member
- ☐ Please keep my/our membership anonymous

If you selected public recognition, name(s) to use for recognition:

(For example: "John and Mary Smith" or "The Smith Family")

YOUR STORY (Optional)

Why did you choose to include Bolder Options in your estate plans?

Your story may inspire others to consider legacy giving. We would love to hear what motivated your decision.

May we share your story to inspire others?

☐ Yes, you may share my story

☐ Please contact me first before sharing

☐ Please keep this private

SIGNATURE

Signature: _____

Date: _____

Privacy Commitment

All information is kept strictly confidential. Completing this form creates no legal obligation and does not affect your ability to modify your plans in the future.

Please return completed form to:

Ryan Foss
Donor Relations Director
Bolder Options
2100 Stevens Avenue
Minneapolis, MN 55454
rfoss@bolderoptions.org
+1 (952) 201-2130

Thank you for your commitment to keeping Bolder Options strong forever. We are honored to welcome you to the Mentors for Tomorrow Legacy Society.