



Cal Farley's

HERITAGE SOCIETY

Estate Intention Letter

(Use for wills, trusts, IRAs, retirement plans, investment accounts and/or life insurance)

It is my pleasure to inform you that I have named Cal Farley's as a beneficiary of an estate gift. The approximate value of my gift, which will provide life-changing programs and services for the boys and girls of Cal Farley's will be \$_____. (I prefer not to disclose the amount of my gift.)

Understanding that my intention to make this gift may be revocable, I will inform Cal Farley's should the value of my estate's potential donation significantly change. I hope my charitable intent will inspire others to contribute to the life-changing work of Cal Farley's.

Estate-Planning Worksheet — **CONFIDENTIAL**

First Name: _____ **Last Name:** _____

Spouse First Name: _____ **Last Name:** _____

Date of Birth: / / **Social Security#:** _____

Address: _____ **City:** _____

State: _____ **Zip Code:** _____ **Apt#:** _____

Phone: _____ **Email:** _____

- I acknowledge Cal Farley's Boys Ranch as a beneficiary of my estate*
- I would like to become a member of the Cal Farley's Heritage Society*

Estate Representative: _____

Attorney **Accountant** **Broker** **Other**

Please select one

Representative Address: _____

City: _____ **State:** _____ **Zip Code:** _____

Phone: _____ **Email:** _____

Please check one of the following:

- Cal Farley's is in my last will and testament
- Cal Farley's is in my trust
- Cal Farley's is in my life insurance policy
- Other _____

Please check one of the following:

- I am giving Cal Farley's a gift of stock
- I am giving Cal Farley's a gift of real estate
- I am giving Cal Farley's a gift of personal property: _____
- I am giving Cal Farley's a gift of mineral rights
- I am giving Cal Farley's a gift of IRA or retirement plan income
- I am giving Cal Farley's a gift of a charitable gift annuity

Please check one of the following:

- I agree to have my name listed in Cal Farley's publications and/or on Cal Farley's website as a member of the Cal Farley's Heritage Society.

Please list my name as _____.

- I agree to have my name engraved on a memorial paving stone to be placed in the Cal & Mimi Farley Memorial Garden located at Cal Farley's Boys Ranch.

Please list my name as _____

and my home state as _____.

- I prefer to be listed as "anonymous" in any public roll of members of Cal Farley's Heritage Society.
- Do not include my name in any public roll of members of Cal Farley's Heritage Society.

Cal Farley's is in my estate plans as a beneficiary

as of _____ (date)

Signature



BOYS RANCH

FOUNDED BY CAL FARLEY

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