



Declaration of Intent

As an expression of my desire to provide older adults and caregivers with the support and resources they need and in recognition of my confidence in AGE of Central Texas and its' mission, it is my intent to name AGE as a beneficiary of my/our planned gift.

I have included a gift to AGE of Central Texas (Tax ID 74-2431028) through:

- Bequest in My Will or Trust
- Life Insurance Beneficiary Designation
- Retirement Plan Beneficiary
- Appreciated Securities (ex. stocks, bonds, mutual funds)
- *Personal Properties (ex. car, furniture, jewelry)
- *Gift of Real Estate and/or Mineral Interests (ex. vacation home, commercial property, vacant lot, etc..)
- Qualified Charitable Distribution (IRA Rollover)
- Donor Advised Fund
- Cash
- *Other, please list: _____

****=If interested in giving this way, please contact Jayden Beatty at
JBeatty@AGEofCentralTX.org***

My gift is currently valued at:

- \$ _____
- All of my estate. Estimated amount based on today's value: _____
- Part of my estate. Estimated amount based on today's value: _____
- Other, please describe: _____

I would like my gift designated to:

- Unrestricted
- Restricted for a specific use. Please describe: _____

*Gift designation, if specified, may be dependent on the status of the program upon receipt of gift. If the donor's specified allocation is no longer available upon receipt of the gift, the funds will be directed towards a general sustainability fund that will be used to support the organization's most pressing needs.

I would like my gift to be made:

- In memory of: _____
- In honor of: _____
- Anonymous: _____

In the event of public recognition I would like the gift listed as (please print):

Ex. Jane Doe or in memory of Jane Doe

*AGE reserves the right to alter the name designated for public recognition at our discretion. Any changes made will be communicated to conservators of the estate.

If possible, would you be able to provide AGE of Central Texas with a copy of the will or other documents related to the intended gift? If yes, an AGE representative will follow up to obtain the document(s).

____ Yes

____ No

I/we will inform AGE of Central Texas should I/we change our intent or should the dollar value/amount of my/our estate's potential donation.

Donor Information:

Name (please print): _____

Email: _____

Phone: _____

Street Address: _____

City: _____

State: _____ Zip: _____

Signature: _____

Date: _____

As with any decision involving your assets, we urge you to seek the advice of your professional counsel when considering a gift to Austin Groups for the Elderly (Tax ID/ EIN Number 74-2431028).

Please return this form to:
AGE of Central Texas
Attn: Jayden Beatty
3710 Cedar St. BOX 2
Austin, TX 78705
or
JBeatty@AGEofCentralTX.org