



# Rosalie Edge Society

## Confidential Information Sheet

- Yes, I have made provisions for Hawk Mountain in my estate plans
- Yes, I believe my planning qualifies me for The Rosalie Edge Society (value \$25,000 or more) OR I already have made or plan to make a gift of \$25,000 or more to support endowment.
- I would like to learn more       I am not prepared to discuss at this time

Name \_\_\_\_\_ Birthdate \_\_\_\_\_

Spouse or Companion Name \_\_\_\_\_ Birthdate \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Daytime Phone ( ) \_\_\_\_\_ Alternate Phone ( ) \_\_\_\_\_

Email Address \_\_\_\_\_

Children's names and birthdates (Optional)  
\_\_\_\_\_  
\_\_\_\_\_

Employer \_\_\_\_\_ Office Phone ( ) \_\_\_\_\_

- |  |  |
|--|--|
| <input type="checkbox"/> Yes, we have made provision(s) for Hawk Mountain <ul style="list-style-type: none"> <li><input type="checkbox"/> Outright bequest</li> <li><input type="checkbox"/> Provision in will of surviving spouse</li> <li><input type="checkbox"/> Present charitable trust with Hawk Mountain</li> <li><input type="checkbox"/> Life insurance policy (paid up)</li> <li><input type="checkbox"/> Life insurance (still being funded)</li> <li><input type="checkbox"/> Charitable trust established at death</li> <li><input type="checkbox"/> Stocks or other securities</li> <li><input type="checkbox"/> Other _____</li> </ul> | <input type="checkbox"/> Please get back in touch with me about: <ul style="list-style-type: none"> <li><input type="checkbox"/> Bequest</li> <li><input type="checkbox"/> Charitable Trusts</li> <li><input type="checkbox"/> Endowment Gift</li> <li><input type="checkbox"/> Gift of real estate</li> <li><input type="checkbox"/> Gift of appreciated securities</li> <li><input type="checkbox"/> Gift of life insurance</li> </ul> |
|--|--|

Estimated current value for Hawk Mountain: \_\_\_\_\_

- I would like to discuss designating my gift for a specific program area

Date \_\_\_\_\_ Your signature \_\_\_\_\_

**NOTE:** Current gifts of cash or securities must be a single gift of at least \$25,000 to be included in the Rosalie Edge Society

