



CONFIDENTIAL STATEMENT OF LEGACY GIFT

LEGACY GIFT INFORMATION

If you have made a legacy gift to Quest, Inc., please take a moment to complete the form below and return it to us. Legacy donors who have remembered Quest, Inc. with a life income gift or have named Quest, Inc. as a beneficiary of a will, trust, retirement plan, or life insurance policy are recognized as members of the Legacy Society.

Name: _____ is this a joint gift? (Y/N) Yes No

Spouse: _____

Relationship with Quest, Inc.: _____

Mailing Address: _____

City: _____ State: _____ Zip: _____

Telephone: _____ Email: _____

Date of Birth: _____ Spouse Date of Birth: _____

I/We have named Quest, Inc. as a beneficiary in one or more (please indicate if Quest, Inc. is named as a primary, secondary, or contingent beneficiary) to bequest in my/our will:

(Check all that apply)

- Will or Living Trust: _____ specific amount or _____%
- IRA, pension, 401(k), 403(b) or other retirement account
- Life Insurance Policy
- Donor-Advised Fund
- Charitable Remainder Trust (CRT)
- Charitable Lead Trust (CLT)
- Other *(please specify)*: _____

_____ *(Please initial)* I/We have attached copies of the documentation (ex. sections of my will or trust, beneficiary designation forms, bank or brokerage statements, etc.).

_____ Gift Value *(or best estimate)*

Gift Designation *(if applicable)*: _____

Comments: _____

Please enroll me/us as a member of the Legacy Society:

- I/We may be included in a list of Legacy Society Members in Quest, Inc. Publications
- I/We prefer to remain anonymous, but will accept other benefits of membership

While this form is not a binding agreement or pledge, it simply permits us to record your estimated gift, recognize you for this intention, and "have the files in order" for future use. The details of this form as well as any additional information you share with us will remain confidential.

Signature(s): _____ Date _____



Quest, Inc. | Philanthropic Department | 1509 E. Colonial Drive Suite 300 | Orlando, FL 32803

• T | 407.218.4369 • F | 407.218.4301 • E | Robert.Haight@QuestInc.org