



**THE PROVIDENCE ATHENÆUM
PLANNED GIVING DECLARATION OF INTENT**

Thank you for your intention to include the Providence Athenæum in your estate plan. So we may record and recognize your intention, please complete this form with as much detail as you are willing to share. Although we do not require you to disclose the details or amount of your estate gift, it is helpful for the Providence Athenæum's long-term planning purposes. Any information about your planned gift will remain confidential. Submitting this form does not create a binding legal or financial obligation, and simply notifies the Providence Athenæum of your intention to make a planned gift. We realize that your circumstances may change, and that you may choose to adjust your plans at any time.

Donor Name: _____ Birth Date: _____

Donor Name: _____ Birth Date: _____

Address: _____

City: _____ State: _____ Zip: _____

Home phone: _____ Business phone: _____

Email(s): _____

GIFT RECOGNITION

The Providence Athenæum would like to acknowledge planned giving intentions by recognizing Athena Society members in publications including its Annual Report and on its website. No information other than donor names is provided.

- Yes, you may include my/our name(s) in public listings of Athena Society members. I/We would like to be listed as follows: _____
- No, I/we wish to remain anonymous.

TYPE OF GIFT

As an expression of my/our commitment to the Providence Athenæum, I/we have included the library in my/our estate plan through the following provision(s):

- | | |
|--|--|
| <input type="checkbox"/> Will | <input type="checkbox"/> Charitable Gift Annuity |
| <input type="checkbox"/> Living Trust | <input type="checkbox"/> Charitable Remainder Trust |
| <input type="checkbox"/> Life Insurance | <input type="checkbox"/> Charitable Lead Trust |
| <input type="checkbox"/> Retirement Plan | <input type="checkbox"/> Other (please specify): _____ |

DESCRIPTION OF GIFT

Please describe the nature of your gift to the Providence Athenæum (for example, percentage of estate, specific dollar value, description of property, etc.):

I estimate the current value of this provision in my estate plan to be \$_____

This is a contingent gift (the Providence Athenæum is an alternate beneficiary, and will only receive the gift under certain circumstances.) Please explain conditions:

PURPOSE OF GIFT

This gift is to be used for:

The priority needs of the Providence Athenæum, and is an unrestricted gift.

The Providence Athenæum's endowment.

Other: _____

We would appreciate you discussing your wishes with Athenæum staff prior to providing instructions here, to ensure that your request can be fulfilled.

PROFESSIONAL ADVISOR INFORMATION

I/We worked with the following attorney/estate planner/advisor/administrator to establish plans for this gift:

Name: _____

Profession/Title: _____

Company: _____

Address: _____

Phone: _____

Email: _____



Donor (Printed Name): _____

Donor Signature: _____ Date: _____

Donor (Printed Name): _____

Donor Signature: _____ Date: _____

Please return this confidential form, preferably along with a copy of the section of your estate plan that references the planned gift, to:
The Providence Athenæum
Attn: Matt Burriesci, Executive Director
251 Benefit Street
Providence, RI 02903

Please contact Matt at 401-421-6970 x11 or matt@provath.org with any questions you may have.