

## DREAM BUILDERS MEMBERSHIP FORM

Welcome to **Dream Builders**, a society that recognizes those who have included Habitat Bucks in their long-term plans through a bequest provision in their will or trust, a life-income gift, or other deferred gift.

Name \_\_\_\_\_ Date of Birth \_\_\_\_/\_\_\_\_/\_\_\_\_

Name \_\_\_\_\_ Date of Birth \_\_\_\_/\_\_\_\_/\_\_\_\_

Address \_\_\_\_\_

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

**I/WE HAVE INCLUDED HABITAT FOR HUMANITY OF BUCKS COUNTY IN MY/OUR WILL:**

☐ A specific bequest of \$ \_\_\_\_\_

☐ A percentage bequest of \_\_\_\_\_%. Estimated value \$ \_\_\_\_\_

☐ Other (describe): \_\_\_\_\_

**I/WE HAVE MADE ARRANGEMENTS FOR THE FOLLOWING:**

☐ A life insurance policy.

Death benefit \$ \_\_\_\_\_. Current cash surrender value \$ \_\_\_\_\_

Habitat Bucks is ☐ Primary beneficiary or ☐ Secondary beneficiary

☐ A Qualified Retirement Plan (IRS, 401k, 403b)

Habitat Bucks interest \_\_\_\_%. Current market value of plan \$ \_\_\_\_\_

Habitat Bucks is ☐ Primary beneficiary or ☐ Secondary beneficiary

☐ Charitable Gift Annuity

☐ Charitable IRA Rollover Contribution/Required Minimum Distribution

☐ Other (describe): \_\_\_\_\_

**PURPOSE**

My/our future gift is:

☐ Unrestricted or ☐ Restricted for the following purpose: \_\_\_\_\_

## AUTHORIZATION FOR USE OF NAME

☐ I/we authorize Habitat Bucks to include my/our name(s) on the membership list of **Dream Builders** in publications and on public recognition displays. I/we understand that this authorization is limited to the use of my/our name(s) only and that the type and amount of my/our gift will remain confidential.

Please list my/our names exactly as follows:

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☐ I/we prefer to remain an anonymous member of **Dream Builders**.

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Signature

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Date

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Signature

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Date

## SHARE YOUR HABITAT STORY

Please tell us why you've chosen to make a planned gift to Habitat for Humanity of Bucks County.

May we inspire others by sharing your story in our print/electronic media? ☐ Yes or ☐ No

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Don't hesitate to contact Jennifer Drayer-McDonald, Resource Development Director, at (215) 822-2812, ext. 316, or [j.mcdonald@habitatbucks.org](mailto:j.mcdonald@habitatbucks.org) if you have any questions or need additional information. Completed forms may be sent to Jennifer's attention at the affiliate address.

# Thank you!

All information on this form has been provided for planning purposes only. Habitat for Humanity of Bucks County acknowledges that the donor is not bound by any statements herein, and may choose to add, subtract, or revoke these arrangements at any time, at the donor's sole discretion.