

**HERITAGE RESIDENT BENEFIT FUND DONATION FORM**

Return form to: The Heritage Resident Benefit Fund, Attn: Dick Lewis, Apt.P308

                                         201 Inspiration Blvd., Reading PA 19607

1. **Check** $\_\_\_\_\_\_\_\_\_\_\_ Check # \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ *(Checks payable to The Heritage Benefit Fund)*
2. **Credit Card** Amount $ \_\_\_\_\_\_\_\_\_\_\_ Account # \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Exp. Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Security Code \_\_\_\_\_\_\_\_\_\_\_\_\_

1. **Pledge donation over 3-year period** Total amount $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Each payment of $ \_\_\_\_\_\_ to begin on (date) \_\_\_\_\_\_\_\_\_\_\_\_\_\_ and be made:

Annually \_\_\_\_ Bi-Annually \_\_\_\_ Quarterly \_\_\_\_ Monthly \_\_\_\_\_

\_\_\_\_\_\_ I/We give you permission to automatically withdraw this amount monthly. *(Paperwork will be provided.)*

1. **Additional options** *(Please options below and who to contact about your choice).*

I/We choose to donate funds using Option # \_\_\_\_\_\_\_\_\_\_\_ in the amount of $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

**Signature authorizing donation: ­­­­­­**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

NAME(S) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ PHONE #\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

ADDRESS \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

EMAIL \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Ο *I/We wish to remain anonymous.*

**Option #1 -** Designation of remaining funds from your Heritage entrance fee.

*Please see Executive Director of The Heritage to discuss amount and how to arrange.*

**Option #2 -** Donation of stocks or a distribution from your qualified IRA or retirement plan.

*Please discuss with your financial advisor to discuss how to arrange the stock transfer or IRA/Retirement distribution and the tax advantages.*

**Option #3 -** Designate the Fund as the beneficiary of your life insurance policy.

*Your insurance agent can provide you with an amount and beneficiary form designating The Heritage Benefit Fund as the primary beneficiary.*

**Option #4 -** Planned giving is an option through, i.e. bequests, charitable remainder trusts, charitable lead trusts, Charitable gift annuities, or donor advised funds. *Consult your tax advisor, estate lawyer, and/or accountant on tax and financial advantages and how to arrange for planned giving options for The Heritage Benefit Fund, dba The Heritage Resident Benefit Fund.* EIN: 46-3929379.

*The Heritage Benefit Fund, dba as The Heritage Resident Benefit Fund, is a 501 (c) (3) organization registered with the Commonwealth of Pennsylvania. A copy of the official registration and financial information of The Heritage Benefit Fund may be obtained from the PA Department of State by calling toll free within Pennsylvania at 1-800-732-0999. Registration does not imply endorsement. All donations are tax-deductible to the donor on their personal income tax return.*

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