



## Chicago River Legacy Society – Declaration of Future Intent

Thank you for your intention to include Friends of the Chicago River in your estate plans and welcome you as a member of The Otter Society. In order to effectively plan for our future programming needs and to provide you the appropriate member benefits, please complete this form with as much detail as you are willing and/or able to at this time. Any information about your gift will remain confidential and does not create a binding obligation.

### Recognition of Your Gift

For recognition purposes, please list my/our name(s) as follows:

- ☐ I/we wish to remain anonymous, please do not include my/our name in any public listings of donors.

Briefly describe allocation, designation, and how your gift should be used.

**Statement of Intent and Value of Gift**—Please indicate below (by checking applicable options), how your future gift intention will be fulfilled and provide the estimate value for Friends:

Description	Amount or Percentage	Estimate Amount of Gift to Friends
<input type="checkbox"/> <b>Will or Trust</b> With a sum of	_____	_____
<input type="checkbox"/> <b>Charitable Remainder Trust</b> In the amount of	_____	_____
<input type="checkbox"/> <b>Charitable Lead Trust</b> In the amount of	_____	_____
<input type="checkbox"/> <b>Retirement Fund/IRA</b> With a total current value of	_____	_____
<input type="checkbox"/> <b>Life Insurance Policy</b> With a policy value at maturity of	_____	_____
<input type="checkbox"/> <b>Other Item or Asset</b> Please describe (for example, saving bonds, real estate, securities, etc.):		

Please Complete Reverse Side

- ☐ **Beneficiary**—If Friends is only a contingent beneficiary, please explain conditions.

- ☐ **Documentation**—Please provide us with copies of any documents (or the relevant pages) that include provisions for Friends of the Chicago River.

**Information, Contacts and Relationships You Want Us to Know (family, attorney, etc.).**

Name and Address	Phone and/or Email and Relationship
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

**This Declaration of Intent** enrolls you in The Chicago River Legacy Society/The Otter Society. You will be contacted regarding your participation.

- ☐ **New Intention**—This is a new estate/planned giving intention to Friends of the Chicago River.
- ☐ **Update to Intention**—This is an update to a previously recorded estate/planned gift intention to Friends.

<hr/> Signature	<hr/> Date	<hr/> Signature	<hr/> Date
<hr/> Print Name		<hr/> Print Name	
<hr/> Street Address		<hr/> Street Address	
<hr/> City, State, Zip		<hr/> City, State, Zip	
<hr/> Email and Phone Number		<hr/> Email and Phone Number	

**Please send this form** (together with copies of any relevant documents) to the Development Office at Friends of the Chicago River. Please contact us if you have any questions or concerns at the numbers below.

**Development Office—Friends of the Chicago River**  
411 S. Wells Street, Suite 800  
Email: [friends@chicagoriver.org](mailto:friends@chicagoriver.org) Subject line: The Otter Society  
phone: (312) 939-0490, extension 19  
Fax: (312) 939-0931  
[www.chicagoriver.org](http://www.chicagoriver.org)

Friends of the Chicago River is an nonprofit organization except under IRS Section Code 501(c)3. Please keep a copy for of this signed document for your files. This document is not legally binding.