THE SERVANT CIRCLE

2008 VOLUNTARY NOTIFICATION SURVEY

As evidence of your desire to provide a legacy of support to the Lutheran Deaconess Association, please provide the following information regarding your provision for a gift to the LDA in your estate plans. This commitment is revocable and can be modified at any time. All information gathered here will be held in strict confidence and will not be shared with any other person or entity without your express consent.

Please indicate whether the LDA may include your name in any public listings of ***The Servant Circle.*** The terms of your gift will remain confidential.

❒ I/We would be pleased to be included in ***The Servant Circle*** public membership listings.

❒ I/We prefer that our gift remain anonymous, but will accept other benefits of membership.

_____
Name(s) as you would like it to appear in all acknowledgements

_____
Address City State Zip

(_____)_____ _____
Phone E-mail

_____
Birth Date(s)

Members often modify their gift plans to reflect changing personal, family, and/or other interests. To keep our records up-to-date, please indicate how you have made a planned gift to the Lutheran Deaconess Association. (Check as many as appropriate.)

❒ I have named the LDA as a beneficiary in my will or living trust to receive a percentage of my estate.

❒ I have named the LDA as a beneficiary in my will or living trust to receive a specific dollar amount.

❒ I have established an income-producing gift for the benefit of the LDA (e.g. charitable gift annuity or trust).

❒ I have named the LDA as a beneficiary of a life insurance policy.

❒ I have named the LDA as a beneficiary of a retirement plan (e.g. IRA, 401(k), or 403(b)).

❒ Other: _____

The future viability of the Lutheran Deaconess Association will be advanced through planned gifts. Planning for the future is made easier when we know what areas are designated for planned gifts. Please indicate how you would like your gift to be used:

❒ Unrestricted ❒ Endowed Scholarship

❒ Endowment (please describe below) ❒ Other (please describe below)

_____

By stating an amount, your estate is not legally bound by this statement and you may choose to add, subtract, or revoke this gift at any time, at your sole discretion. (*The LDA requests notification if you make changes or adjustments to your gift.)* The LDA understands that the value of many deferred gifts fluctuates and may increase or decrease due to market conditions or other factors.

*The approximate present value of my deferred gift is $*_____. *Date:* _____

❒ I have a planned giving question. Please contact me. Best day/time: _____