



LEGACY PLANNING

Thank you so much for being a dedicated friend of Allen Creek Preschool.

By documenting your estate plans with Allen Creek, we are able to plan appropriately and ensure the careful stewardship of your legacy in our community. Thank you for completing and returning this form.

Full name ☐ Dr. ☐ Mr. ☐ Mrs. ☐ Ms.

Nickname/preferred name

Spouse/partner name ☐ Dr. ☐ Mr. ☐ Mrs. ☐ Ms.

Spouse/partner nickname/preferred name

Address

Email

Spouse/partner email

Phone (primary)

Phone (other)

Preferred method of contact ☐ Mail ☐ Phone ☐ Email ☐ Personal visit

Professional advisor(s) who helped with your estate plans

YES! I/we have included Allen Creek Preschool in my/our estate plans.

- ☐ Bequest in will ☐ Charitable Remainder Trust
☐ Life Insurance Beneficiary ☐ Retirement Plan Beneficiary
☐ Other: _____

My/our intentions are for a specific purpose: