



CONFIDENTIAL MEMBERSHIP FORM

Welcome to the *Douglas Munro Society*, a society that recognizes all those who have included the Coast Guard Foundation in their long-term plans through a bequest provision in their Will or trust, a life-income gift or other deferred gift.

Name(s) _____ Date of Birth ____/____/____
(please print)

Name(s) _____ Date of Birth ____/____/____
(please print)

I/We have included the Coast Guard Foundation in my/our will

A specific bequest of \$ _____

A percentage bequest of ____%. Estimated value \$ _____

I/we do not wish to disclose the amount.

I/we have made arrangements for the Coast Guard Foundation through:

A life insurance policy.

Death benefit \$ _____ Current cash surrender value \$ _____

The Foundation is Primary beneficiary Secondary beneficiary (please check one)

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

Foundation interest ____% Current market value of plan \$ _____

The Foundation is Primary beneficiary Secondary beneficiary (please check one)

Charitable Remainder Unitrust or Annuity Trust

Foundation interest ____% Current market value of trust \$ _____

Testamentary Charitable Lead Trust

Foundation interest ____% Expected payout \$ _____

Other (describe): _____

PURPOSE

My/our future gift is:

Unrestricted

Restricted for the following purpose (please specify) _____

DOCUMENTATION

Yes, I/we will share a copy of the portion of the will that applies to the Coast Guard Foundation or the trust agreement or Change of Beneficiary Form (401k, 403b, IRAs, Insurance) in which the Foundation is named.

AUTHORIZATION FOR USE OF NAME

I/we authorize the Coast Guard Foundation to include my/our name(s) on the membership list of The Douglas Munro Society 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 to the Foundation will remain confidential.

I prefer to remain an anonymous member of The Douglas Munro Society.

Signature

Date

Signature

Date