thesecondopinion

Providing Clarity, Compassion & Hope since 1969

Every Second Opinion Counts

Bequest Intention Form

Name: _____ Date: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

1. I/We have included The Second Opinion as a beneficiary in my/our:
   - Will/Living Trust
   - Retirement Plan
   - Life Insurance Policy
   - Other: _____
2. The estimated value of my/our gift is:
   - Specific amount: $_____
   - Percentage of estate: _____% (Estimated value: $_____)
   - I wish to keep the value private
3. Gift Designation:
   - Unrestricted use
   - Specific purpose: _____
4. Recognition Preferences:
   - Please list my/our name(s) as: _____
   - I/We wish to remain anonymous
5. Additional Information:
   _____
   _____
6. Executor/Trustee Information:
   Name: _____
   Address: _____
   Phone: _____ Email: _____

Signature: _____ Date: _____

Signature: _____ Date: _____

Thank you for your generous support. We understand this form is non-binding and does not create a legal obligation. Please notify us of any changes to your plans.

Bequest language for use in will or trust.

I/We bequeath the sum of (dollar amount) or (percentage of estate) to The*second*opinion, a non-profit corporation located at 1200 Gough Street, Suite #500, San Francisco, CA 94109, with EIN #94-1696341, to used where most needed, or list specific purpose here.