

# PHOENIX ROTARY CLUB CHARITIES HERITAGE SOCIETY ENROLLMENT

Yes, I/we would like to become a member(s) of the Phoenix Rotary Club Charities Heritage Society.

Names: \_\_\_\_\_

\_\_\_\_\_  
*(Please print/type names as you wish it to appear in the Heritage Society roll)*

This is a JOINT bequest and both spouses' names should appear in any recognition.

Address: \_\_\_\_\_  
(Street)

\_\_\_\_\_  
(City, State, Zip Code)

Dates of Birth: \_\_\_\_\_  
(Husband) (Wife)

Telephone: (Home) \_\_\_\_\_ (Business) \_\_\_\_\_

E-mail: \_\_\_\_\_

My/our Bequest will be funded by:

Will     Living Trust     Charitable Remainder Unitrust     Life Insurance  
 IRA/401K     Other: \_\_\_\_\_

Amount provided for Phoenix Rotary Club Charities in my/our final estate plans:  
(i) \_\_\_\_\_% of my/our residual estate (which I/we estimate to be \$ \_\_\_\_\_), and/or (ii) \$ \_\_\_\_\_, and/or (iii) the property described in the attached Schedule.\*

**Yes**, Phoenix Rotary Club Charities may publish my name as an example to others.

**No**, I would like my name withheld from all publications (including reports) and to remain anonymous.

I have included a copy of my:  Will     Trust     Life Insurance Policy for safekeeping by the Phoenix Rotary Club Charities.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

\_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

\_\_\_\_\_

\* Phoenix Rotary Club and Phoenix Rotary Club Charities urge you to seek advice from a legal or financial professional of your choosing in all matters pertaining to a bequest or living trust.