BDFNC VISIONARY SOCIETY

VISIONARY SOCIETY

Interest & Notification Form

Honoring your commitment to the bleeding disorders community for generations to come.

Donor Information

Name(s): _____

Address: _____

Address Line 2: _____

City, State, ZIP: _____

Phone: _____

Email: _____

Legacy Gift Details

- ☐ I have already included the Bleeding Disorders Foundation of North Carolina in my estate plan.
- ☐ I am considering a legacy gift and would like more information.
- ☐ I would like to speak with someone confidentially about making an endowment or planned gift.
- ☐ You may recognize me/us as a member of the BDFNC Visionary Society.

Type of Planned Gift (if known)

- ☐ Bequest in a Will or Living Trust
- ☐ Beneficiary of Retirement Plan (e.g., IRA, 401(k))
- ☐ Beneficiary of Life Insurance Policy
- ☐ Qualified Charitable Distribution
- ☐ Other (please describe): _____

Optional Gift Information

Estimated value of planned gift (if known): $ _____

Designation (if any): ☐ General Endowment ☐ Specific Program: _____

Recognition Preferences

The Bleeding Disorders Foundation of North Carolina recognizes BDFNC Visionary Society members in publications and events unless anonymity is requested.

Please list my/our name(s) as follows:

_____

☐ I/We prefer to remain anonymous.

Thank You!

If you have questions about BDFNC and planned giving, reach out to our Strategic Giving Team at info@bleedingdisordersnc.org.

Thank you for your generosity and support of our mission!

We know that life circumstances can change and you may need to alter or reconsider your gift in the future. That's all right - reporting your gift today does not obligate you now nor in the future.

This is for informational purposes only and is not intended to provide, and should not be relied on, for tax advice. We recommend consulting a financial or tax advisor with any specific questions about how a planned gift may impact your personal situation before making any contribution.

Completing this form does not update your will, trust, or beneficiary designations - those changes must be made through your attorney/estate planner or account custodian.

We value your privacy. The email, address and phone number provided on this form will strictly be used to contact you regarding your gift. We will never use your information for marketing purposes, nor will we sell, rent, share, or trade your contact details with any third parties.