
What is a Bequest Intention Form?

A bequest intention form (sometimes called a *bequest intent form*) is a confidential, non-binding document that allows a donor to inform a church, diocese, or Episcopal-related organization that it has been included in their estate plans.

The form serves as a record of a future gift, which is typically made through a will, trust, or beneficiary designation (such as a retirement account or life insurance policy)

Key Characteristics and Purpose

- **Non-Legally Binding.** Completing the form does not create a legal obligation. Donors may change or revoke their plans at any time
 - **Clarity of Intent.** The form helps the church understand the donor's general intentions—for example, whether the gift is designated for a specific ministry or for general use
 - **Recognition (Optional).** It allows the church to recognize donors during their lifetime, such as through inclusion in a legacy society, if the donor wishes.
 - **Future Planning.** Bequest intentions help faith communities plan responsibly for long-term ministry and financial sustainability.
 - **Continuity and Documentation.** The form helps ensure that a donor's legacy intentions are known and honored over time, even as clergy or staff change. *(All information is voluntary and shared at the donor's discretion.)*
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Typical Information Included

- **Donor Information**
Name and contact information (additional details, such as date of birth, may be optional).
- **Type of Planned Gift**
For example, a bequest through a will or trust, or a beneficiary designation.
- **General Description of the Gift (Optional)**
Donors may choose to indicate whether the gift is a specific asset, a percentage of an estate, or another form—**without stating a dollar amount.**
- **Designation of Use**
Whether the gift is intended for a specific ministry or purpose, or for unrestricted use
- **Confidentiality and Anonymity**
Donors may indicate whether they wish their intentions to remain confidential or anonymous.