



The Heritage Club **Legacy Society Member Profile**

Please complete your Member Profile,
so that we may welcome you into the Heritage Club.

Name(s): _____

Date of Birth: _____ Date of Birth (Spouse): _____

Address: _____

City: _____ State: _____ Zip: _____

Home Phone: _____ Cell Phone(s): _____

Email(s): _____

We would be honored to recognize your generosity as a member of The Heritage Club. (Neither amount nor designation, if provided, will be included on the listing.)

- ☐ I/We would like others to be encouraged by my/our example, I/we hereby give permission for my/our name(s) to be listed. I/we would like my/our name(s) to appear as:

- ☐ I/We are honored to be included; however, I/we prefer to remain anonymous. Please do not include my/our name in any listings.
- ☐ I/We also would be interested in sharing my/our story with others.

I/we have made a gift to Atherton in my/our estate plan in order to support their mission to enrich the lives of Christian living for seniors.

This form is non-binding and does not constitute a legal promise of any future donation to Atherton. It is understood that bequests are revocable and that your estate plans may change.

(Please Complete Backside of Member Profile)

Please complete all fields and/or attach the relevant document page(s) describing your gift and return to:

Atherton

Attn: Kimberly S. Flowers, Chief Development Officer

214 South Atlantic Boulevard

Alhambra, CA 91801

Phone: 626.863.1704 * Email: ksflowers@abh.org

Tax ID #95-1683861

Please check all that apply:

I/We have made a gift to Atherton through my/our:

- ☐ Will or living trust
- ☐ Life insurance policy(ies)
- ☐ Retirement account(s)
- ☐ Financial or investment account(s)
- ☐ Charitable trust
- ☐ Prefer not to say

My/Our gift is stated as:

- ☐ A specific amount of \$_____.
- ☐ A percentage gift of _____% (currently, this may result in a gift of \$_____)
- ☐ A gift of the following property: _____
(currently, this property has a value of \$_____)
- ☐ Prefer not to say

Signature: _____ Date: _____

Signature: _____ Date: _____

(Optional)

My/Our Executor is:

Name(s): _____

Company (if applicable): _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____