



PLANNED GIVING COMMITMENT FORM

Robert Irvine Foundation's planned giving supporters are leaving their legacy and making a larger impact to support our nation's heroes.

I/we would like to include the Foundation in my/our estate plans.

Name(s): _____

Address: _____

Email: _____ Phone: _____

☐ I /we would like to be recognized as: _____

☐ I/we wish to remain anonymous.

Please indicate your planned gift below:

- ☐ Bequest ☐ Life insurance policy ☐ Retirement plan beneficiary ☐ Stock gift

Other _____

This gift will be:

☐ A specific amount: \$ _____ ☐ A gift of a specific asset _____

☐ A percentage of the residuary of my estate, trust, or retirement plan, _____ percent

Please add any details you wish to share: _____

All information provided will be kept in the strictest confidence and will be used for internal planning purposes only. We understand that you may need to use estimates rather than exact figures.

Purpose of the planned gift to the Robert Irvine Foundation

☐ Unrestricted gift to provide maximum flexibility for the Robert Irvine Foundation to use for greatest need.

☐ For a specific purpose: _____

Signature: _____ Date: _____

Mail completed form to:

Judith Otter, President, Robert Irvine Foundation, 1227 N. Franklin St. Tampa, FL 33602

For further inquiries: Judith Otter at Jotter@RobertIrvineFoundation.org

Completion of this form is not intended to be legally binding, but notification of intent. Please discuss your planned giving intentions with your professional financial advisor. The Robert Irvine Foundation is a tax-exempt nonprofit organization recognized by section 501(c)(3) of the Internal Revenue Code.

Tax ID #46-5420676. Contributions are deductible as allowed by law.