

Gift Intention

Name: _____

Phone: _____

Email: _____

Address: _____

City: _____

State: _____ Zip: _____

Professional Advisor: _____

Firm: _____

Phone: _____

Email: _____

My Legacy

- I have included Community Opportunity Center in my estate plan and have enclosed the intent form.
- I intend to include Community Opportunity Center in my estate plan.
- I am interested in including Community Opportunity Center in my estate plan
- Please contact me with more information. I am interested in including Community Opportunity Center in my estate plan. I may like you to meet with my Financial Advisor.