



Legacy Society

BEQUEST NOTIFICATION FORM

AGREEMENT OF CONFIDENTIALITY

Your information will be kept strictly confidential with TEAM, Inc. . Please feel free to tell us only what you are comfortable sharing.

D I/We would like to support the mission and vision of TEAM, Inc. with a legacy gift, and I/we have:
(please check all that apply below)

Dated: _____ Name(s): _____ Signature(s): _____
mo/day/yr

Dated _____ Name(s): _____ Signature(s): _____
mo/day/yr

REVOCABLE BEQUEST

D I included a bequest for TEAM, Inc. in my/our will or living trust. I/We anticipate that the approximate value of my/our bequest(s) will be: \$ _____

REVOCABLE BENEFICIARY DESIGNATION

D I included TEAM, Inc. as a beneficiary of an asset.

The asset of which TEAM, Inc. is a beneficiary is a: *(check all that apply)*

D Retirement asset(s) (e.g., IRA, 401k, 403b, pension, etc.):

D Life insurance policy(ies):

D Other asset(s):

I/We anticipate that the approximate value of my/our beneficiary designation(s) will be:
\$ _____

IRREVOCABLE BENEFICIARY DESIGNATION

D I included TEAM, Inc. as a beneficiary of a charitable trust.

I/We anticipate that the approximate value of my/our remainder trust(s) will be: \$ _____

NAME(S)

_____			_____		
First	M.I.	Last	First	M.I.	Last
_____			_____		
Title		Title			
_____		_____	_____		
Address		Address			
_____		_____	_____		
City	State	Zip Code	City	State	
_____		_____	_____		
Zip Code					

Telephone () _____		Telephone () _____			
_____		_____			
Email (optional) _____		E-mail (optional) _____			
_____		_____			

NAME OF EXECUTOR OF TRUSTEE

First	M.I.	Last

Title		

Address		

City	State	Zip Code

Telephone () _____) _____
_____		_____
E-mail Address (optional) _____		

Please complete the information requested above and return to:

David Morgan
Ex. Vice President
TEAM, Inc.

30 Elizabeth Street
Derby, CT 06418

You may also fax it to: 203-736-5425

Please feel free to contact David directly at 203-736-5420 Ext. 1218 or email at dmorgan@teaminc.org . He would be happy to discuss your ideas and wishes, and answer your questions.