



**OUTWARD
BOUND USA**

Planned Gift Intention Form

To demonstrate my/our commitment to spark lifelong growth through challenge, rooted in the outdoors, to unlock confidence, curiosity, and the skills to thrive with purpose, I/we have made charitable provisions for Outward Bound USA in my/our estate plans.

Note: All information provided will be kept in the utmost confidence and used for internal planning only.

Name(s): _____

Mailing Address: _____

Primary Phone Number(s): _____

Email(s): _____

I/We want to support the mission of Outward Bound USA through a planned gift as described below:

I/We have included a bequest for Outward Bound USA in my/our will or living trust.

I/We have named Outward Bound USA as a beneficiary of an asset:

Retirement Plan

Bank, Investment, or Other Financial Account

Other:

I/We have named Outward Bound USA as a revocable/irrevocable (circle one) beneficiary of a charitable remainder trust.

I/We have included an Outward Bound USA School in my estate. Option to include the name of which School(s) you are supporting:

The anticipated value of my/our gift is/will be approximately \$ _____ or _____% of my/our estate.
(If possible, please include a copy of the bequest language or other wording describing your planned gift.)

outwardbound.org

giving@outwardbound.org

4845 Pearl East Cir Ste 118, PMB 80654, Boulder, CO 80301-6112





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The Outward Bound USA Legacy Circle

The Legacy Circle honors those who have made a planned charitable gift to Outward Bound USA. Recognition includes inclusion in our Annual Report and other Outward Bound USA publications. Please note your name(s) exactly as you wish them to appear or let us know if you prefer to make your planned gift anonymously.

Yes, you may include me/us in listings of members of the Outward Bound Legacy Circle. Please indicate how you would like your name(s) and location to appear in our annual impact report, website, and additional Outward Bound USA publications. (Please note the amount of your intended gift will not be published):

Examples:

Mrs. Jane Smith
Cincinnati, Ohio

Mr. John Miller
New York, New York

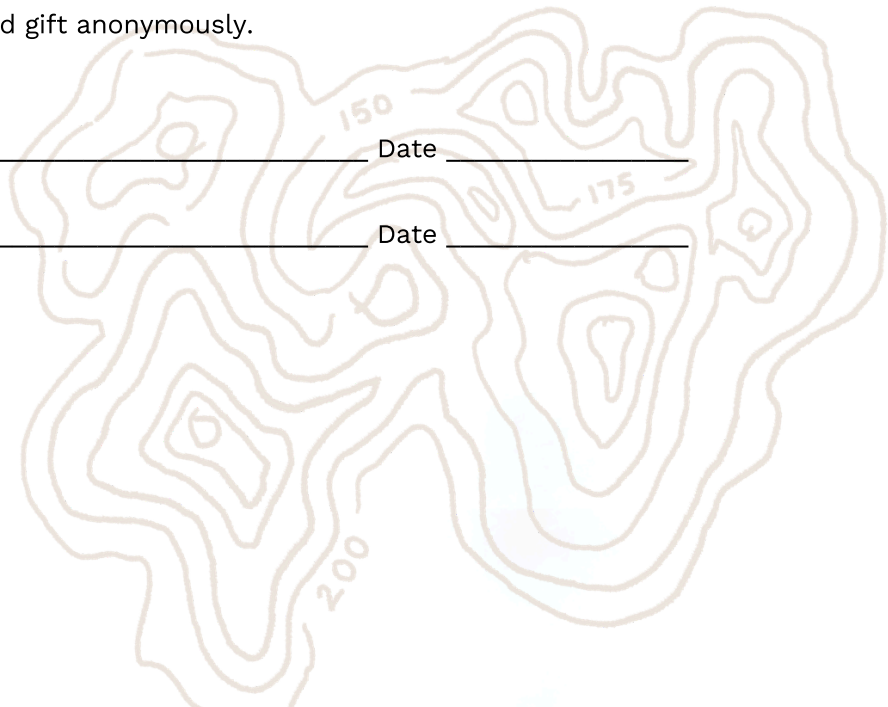
Mr. Curtis* and Maggie Johnson
Atlanta, GA

Name(s) and locations:

No, I/we prefer to make this planned gift anonymously.

Signature _____ Date _____

Signature _____ Date _____



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**OUTWARD
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Please return this completed form and address any questions to:

Lauren Smith, OBUSA Development Officer

4845 Pearl East Cir Ste 118

PMB 80654

Boulder, Colorado 80301-6112

e: giving@outwardbound.org

p: 513.543.7052

Sample Language

"I give, devise, and bequeath to Outward Bound USA, a non-profit corporation, _____ (a sum or percentage of your estate) from my estate as an unrestricted gift."

Name and phone number of attorney or financial advisor (optional): _____

Legal name: Outward Bound USA
Address: 4845 Pearl East Cir Ste 118
PMB 80654
Boulder, CO 80301-6112
Tax ID #: 04-2375956

**Completion of this form is not intended to be legally binding, but notification of intent. Please discuss your planned giving intentions with your professional advisor. Outward Bound USA is a tax-exempt nonprofit organization recognized by section 501(c)(3) of the Internal Revenue Code. Tax ID #04-2375956. Contributions are deductible as allowed by law.*

Planned gifts will be used at the discretion of the organization, and may be used in a match fund, capital campaign or endowment. Unless your planned gift is specifically restricted, Outward Bound USA's leadership team will determine the best use of your generous contribution.

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