

## Estate Gift Advisory

I / We have named the Whispering Oaks Homeowners Association (WOHA) of San Antonio as a beneficiary of an estate gift. This notice provides information about the gift to enable its fulfillment and organizational planning. If this gift plan is modified at any time by me / us, subsequent notice may not be provided to WOHA.

### Documented Directive:

WOHA has been designated as beneficiary in a will or trust documents which will be overseen by a appointed representative.

*Note: this formality is recommended for all gifts, but particularly important for gifts of cash or property (real estate, vehicle, artwork, stock, bonds) which may provide no other means of legal designation.*

WOHA has been designated as beneficiary directly within financial investment or insurance accounts: \_\_\_\_\_

*Note: most financial investments (Bank Account, Mutual Funds, CD, IRA) and insurance policies allow a beneficiary to be specified. Modifying a will to reflect this allocation is recommended but not necessary, however a will should not be contradictory.*

### Approximate Gift Amount:

The gift is a predetermined amount of cash: \$ \_\_\_\_\_

The gift is a non-cash asset whose final value will be determined at a later time, but valued today at approximately: \$ \_\_\_\_\_

### Gift Intention:

Usage of the gift is solely the determination of WOHA.

If feasible, the gift shall be applied to the following purpose WOHA supports: \_\_\_\_\_

### Recognition:

WOHA may publicize the source of the gift.

WOHA should not publicize the source of the gift.

WOHA has agreed to apply naming rights for the gift as indicated on the attached document.

### Other Notations (optional):

Additional clarity or instruction about the gift if needed: \_\_\_\_\_

Name: \_\_\_\_\_

Spouse Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Signature & Date: \_\_\_\_\_

Spouse Signature & Date: \_\_\_\_\_

**Mail to: WOHA - 11515 Whisper Forest #B - San Antonio TX 78230**