Donor Information Form
Naming Prospectus Associates, Inc. as a Beneficiary

This form is intended for the charity's records only and does not replace legal documents or beneficiary designation forms required by financial institutions.

Section 1: Donor Information

- **Full Legal Name:** _____
- **Primary Address:** _____
- **City, State, ZIP:** _____
- **Telephone:** _____
- **Email:** _____
- **Date of Birth (optional):** _____

Section 2: Type of Planned Gift (check all that apply)

☐ Bequest in Will or Trust

☐ Retirement Plan (IRA, 401(k), 403(b), pension)

☐ Life Insurance Policy

☐ Bank or Investment Account (POD/TOD)

☐ Charitable Trust

☐ Other: _____

Section 3: Description of the Gift

Please describe how you have named or intend to name the charity as a beneficiary.

- **Name of Account, Policy, or Document:** _____
- **Financial Institution or Trustee:** _____
- **Gift Type:** ☐ Percentage ☐ Fixed Amount ☐ Residual ☐ Contingent
- **Estimated Value (optional):** _____

Section 4: Charity Identification Information

When naming the charity as a beneficiary, donors should ensure the following information is used consistently in legal or financial documents:

- **Legal Name of Charity:** Prospectus Associates, Inc. (DBA ProBerco)
- **Address:** 840 William Lane, Reading, PA 19604
- **Tax Identification Number (EIN):** 23-2023612
- **Contact Person or Department:** Jessica Penchard, Development & Public Relations Director

Section 5: Donor Intent and Recognition

- **Purpose of Gift (if unrestricted, write "General Support"):**

- **Recognition Preference:** ☐ May be publicly acknowledged

☐ Wishes to remain anonymous

Section 6: Notification and Acknowledgment

By completing this form, I acknowledge that:

- This form is not a legal instrument and does not amend my will, trust, or beneficiary forms.
- I am encouraged to consult my attorney, financial advisor, or tax advisor regarding this gift.
- I am providing this information so the charity is aware of my intentions and can ensure my wishes are honored.

Donor Signature: _____ **Date:** _____

Information to Include When Naming Prospectus Associates, Inc. as a Beneficiary

When designating a charity as a beneficiary, donors should ensure:

- The **exact legal name** of the charity is used to avoid confusion.
- The **correct address and EIN** are included, especially for financial institutions.
- The **type of gift** (percentage, amount, residue, or contingent) is clearly specified.
- Any **restrictions or intended purpose** of the gift are described clearly and are realistic.
- The charity is named as **primary or contingent beneficiary**, as intended.

Clear and accurate information helps ensure that your philanthropic intentions are fulfilled efficiently and without delay.