



**FOUNDERS CIRCLE PLANNED GIVING COMMITMENT FORM**

You can make a transformative gift by including the Orthopaedic Trauma Association in your will or trust. We are happy to talk through this option with you or your legal advisers.

Join other members of the Founders Circle by including the Orthopaedic Trauma Association in your will or trust. Together, we will transform the future of orthopaedic health.

Name \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

I/we have included (Legal Name) Orthopaedic Trauma Association (Legal Address) 9400 W. Higgins Road, Suite 305 Rosemont, IL 60018-4975 (Tax ID #68-0074461) in my/our estate plans through:

- Bequest
- Appreciated Securities
- Gift of Life Insurance
- Gift of Retirement Plans
- IRA Rollover
- Charitable Gift Annuities:  
Current or Deferred (please circle)
- Retained Life Estate
- Charitable Lead Trust
- Charitable Remainder Trust:  
Annuity Trust or Unitrust (please circle)

This gift will be:

- A specific amount: \$ \_\_\_\_\_  A gift of a specific asset: \_\_\_\_\_
- A percentage of the residuary of my estate, trust, or retirement plan, \_\_\_\_\_ (percent)

My/our gift should be directed to OTA for:

- General unrestricted to provide maximum flexibility for OTA to fulfill its mission.
- A designated gift with the following restrictions: \_\_\_\_\_

Signature of donors(s) \_\_\_\_\_ Date \_\_\_\_\_

Please recognize me/us in the Founders Planned Giving Circle as: \_\_\_\_\_

- I/we wish to remain anonymous

All information provided will be kept in the strictest confidence and will be used for internal planning purposes only. We understand that you may need to use estimates and intentions rather than exact figures.

**Please return to:** Kathleen Caswell, Executive Director, Orthopaedic Trauma Association, 9400 W. Higgins Road, Suite 305, Rosemont, IL 60018. Phone: 8470698-1631 or email: [caswell@ota.org](mailto:caswell@ota.org).

*Completion of this form is not intended to be legally binding, but notification of intent. Please discuss your planned giving intentions with your professional financial advisor. OTA is a tax-exempt nonprofit organization recognized by section 501(c)(3) of the Internal Revenue Code. Tax ID #68-0074461. Contributions are deductible as allowed by law.*