



FOUNDERS CIRCLE PLANNED GIVING COMMITMENT FORM

You can make a transformative gift to the Orthopaedic Trauma Association by including the OTA in your will or trust. We are happy to talk through this option with you or your legal advisers. Together, we will transform the future of orthopaedic health.

Name _____

Address _____

Home Phone _____ Cell Phone _____ Email _____

A gift to the OTA in your will or revocable trust proclaims your confidence that we will continue to serve our mission and make a difference in the lives of future orthopaedic trauma surgeons. The following language may help you and your attorney when drawing up a will or trust:

(Name) I give, devise and bequeath to the Orthopaedic Trauma Association (OTA), a nonprofit 501c(3) corporation, headquartered in Illinois, Federal Tax ID Number #68-0074461, the sum of _____ (or % of my estate), (or other personal property herein described) to be used for its general programs in research and education or for the support of a specific fund or program.

- 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)
- I/we wish to remain anonymous

Signature of donors(s) _____ Date _____

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

All information provided will be kept in the strictest confidence and will be used for internal planning purposes only.

Please return to: Elizabeth Plummer, Director of Development, Orthopaedic Trauma Association, 9400 W. Higgins Road, Suite 305, Rosemont, IL 60018. Phone: 847-698-1631 or email: plummer@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.