



Since its founding in 1995, Volunteers in Medicine (VIM) Clinic has provided exceptional medical care and compassionate treatment to uninsured, low-income adults in Martin County. The Oak Society offers you the opportunity to join others who have committed to making a charitable contribution to The Friends of Volunteers in Medicine (FVIM) Clinic through a bequest or estate plan. Remembering VIM Clinic through a planned gift ensures that our programs and services will remain viable for years to come while advancing your own financial plan. Our work, and the lives we touch, will be your legacy.

We would like to honor those who have made a bequest in their will or estate plan. If you have made a commitment, please complete the following so we may recognize your generosity.

May we list you as a member of The Oak Society in our publications?

- Yes, I/we would like to be listed so that we may inspire others to give.
- I/we prefer to remain anonymous.

Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

TYPE OF PLANNED GIFT

(All information provided is optional)

- Will
- Life Insurance Beneficiary
- Retirement Plan/IRA
- Charitable Trust
- Family Foundation Beneficiary
- Other: _____

Please add any other details you wish to share: _____

Your information will be kept strictly confidential and used for planning purposes only. This form is non-binding and does not constitute a legal promise of any future donation. We understand your estate plans may change.

Signature: _____ Date: _____

We thank you for your help in growing the future of VIM Clinic and giving the gift of health.
Please return this form to: Mary Fields, Executive Director, 417 SE Balboa Ave, Stuart, FL 34994.



Ready to join The Oak Society and grow the future of Volunteers in Medicine Clinic? Here's how!

Designate The Friends of Volunteers in Medicine (FVIM) Clinic as a beneficiary of your retirement plan or life insurance policy. Simply contact the company that holds your retirement plan or life insurance policy. Let them know you would like to update your beneficiaries and they will send you a form. Complete the form and identify the percentage of the proceeds you would like to go to The FVIM Clinic.

Remember The Friends of Volunteers in Medicine Clinic in your will. Including The FVIM Clinic as a recipient of a percentage or specific dollar amount is easy to do. Each individual situation is unique and, therefore, these examples include only some of the possible gift opportunities. Your attorney can review all your options. Below is sample language you can provide your attorney or insert in a will you are preparing yourself.

Percentage of estate for unrestricted purposes

I give, devise, and bequeath to The Friends of Volunteers in Medicine Clinic, Inc., a not-for-profit organization located in Stuart, Florida, _____ percent (%) of the rest, residue, and remainder of my estate as an unrestricted gift to be used for the general purposes of The Friends of Volunteers in Medicine Clinic, Inc. I instruct that all of my charitable gifts shall be made, to the extent possible, from property that constitutes "Income in respect of a decedent" as that term is defined in the Internal Revenue Code.

Specific amount for unrestricted purposes

I give, devise, and bequeath to The Friends of Volunteers in Medicine Clinic, Inc., a not-for-profit organization located in Stuart, Florida, the sum of _____ in cash (or _____ shares of _____ stock) as an unrestricted gift to be used for the general purposes of The Friends of Volunteers in Medicine Clinic, Inc. I instruct that all of my charitable gifts shall be made, to the extent possible, from property that constitutes "Income in respect of a decedent" as that term is defined in the Internal Revenue Code.

Thinking about a more complicated bequest, designating your gift for something specific, or just need more help? The Friends of Volunteers in Medicine Clinic is not a financial or legal advisor. You should always consult your own financial advisor or attorney when making estate plans. We are happy to discuss your specific needs and develop a special plan to ensure your wishes are met. Please reach out to the Donor Relations Manager, Kimberly Perron, by phone at 772-463-4128 ext. 211 or via email at kperron@vimclinic.net. After you've finalized your estate plans, please complete and send us the attached form so that we can properly welcome you to The Oak Society and recognize your generosity.

Information to include on your beneficiary forms or in your will:

Legal Name: The Friends of Volunteers in Medicine Clinic, Inc.
Address: 417 SE Balboa Avenue, Stuart, FL 34994
Tax ID#: 65-1064420