

Thank you for including {Organization Name} in your legacy plans. Please use this form to share details of your intent to provide for the needs of future generations.

**It is with deep satisfaction that (please check one below):**

☐ I/We have already made a provision in my/our estate plan.

☐ I/We shall make a provision in my/our estate plan within the next \_\_\_\_\_ months (12 months or less).

**Gift Information (Optional): With {Organization Name} included as a beneficiary through a:**

☐ Bequest in a will or trust

☐ Donor-Advised Fund

☐ Life Insurance Policy

☐ Gift of real estate

☐ Percentage of IRA or other retirement plan

☐ Remainder of a checking or savings account

☐ Gift of securities or stock

☐ Other (please indicate):

☐ Gift that provides lifetime income

\_\_\_\_\_

**Amount of Gift – Please choose one of the following options:**

☐ My/our bequest will be a specific amount of \$\_\_\_\_\_

☐ My/our bequest will be \_\_\_\_\_ % of my/our estate/IRA/Insurance policy

☐ I/we prefer to keep the details of this commitment confidential or have not determined a valuation.

**Acknowledgment:**

To encourage others to make commitments to the future, I/We permit my/our name(s) to be listed in printed materials and/ online:

☐ I/we permit my name to be listed as: \_\_\_\_\_

☐ I/we prefer to remain anonymous.

Name(s): \_\_\_\_\_

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

City/State/Zip: : \_\_\_\_\_

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

Date of birth (individual 1) : \_\_\_\_\_ Date of birth (individual 2): \_\_\_\_\_

I understand that this letter of intent is not a legal obligation and may be modified at my/our discretion at any time.

\_\_\_\_\_  
Signed

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signed

\_\_\_\_\_  
Date