

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

Organization · 1234 Street · Town, State, Zip · Website

Legacy contact (name, phone, email) OR General legacy or development mailbox and phone