

Letter of Intent for Future Estate Gift

This Letter of Intent represents my/our desire to provide for the future of the organization through a legacy estate gift. I/We understand that this document is not a legally binding contract, but rather an expression of my/our current plans and intent to support the organization's mission in the years to come.

Donor Contact Information

Full Name:

Spouse/Partner Full Name (if joint gift):

Mailing Address:

City, State, Zip:

Phone Number:

Email Address:

Provision Details

I/We have made provisions for this future gift in the following vehicle (for example: Will, Living Trust, Retirement Plan Beneficiary Designation, Life Insurance Policy, or Charitable Remainder Trust):

Gift Vehicle Type:

Estimated Value (optional - specify dollar amount or percentage of estate):

Gift Purpose

It is my/our wish that this future gift be used in the following manner (for example: General/Unrestricted Support, or a specific program, department, or endowment):

Intended Purpose:

Recognition Preference

Please indicate how you wish to be acknowledged (for example: "Publish name as written above", "Keep this gift anonymous", or "Recognize in memory of [Name]"):

Recognition Instructions:

Signatures

By signing this Letter of Intent, I/we express my/our current plans to support the organization. I/We reserve the right to modify or change this intent should circumstances require.

Donor Signature: Date:

Co-Donor Signature (if applicable): Date: