**THIS IS A SAMPLE FORM:** Legal counsel should be consulted prior to drafting any instrument.

To use the following form, **simply click in the gray box and begin typing**—the default text will be replaced by your content and wrap accordingly.

NOTE: This page cannot be deleted from the document. When you are ready to print your letter, choose to print only pages 2-4.

## LETTER OF INTENT

For a Future (Estate) Gift from

Name

NOTICE TO DONOR(S): Thank you for your generous support of the Community Foundation Name. We respect your privacy and we will keep this information confidential. Every effort will be made to comply with your wishes. This information is for long-term planning purposes only and to estimate our future budgetary commitments to serving the charitable priorities of the Community Foundation Name. We will understand your wishes if you only want to share partial information, or none at all.

As an indication of our (my) support, we (I) certify that we (I) have made an estate provision for Community Foundation Name as follows:

### DESCRIPTION OF ESTATE PROVISION

### 1. Gift through Will or Trust:

Bequest of specific property or amount. Description:

Bequest of percentage of estate (if so, please indicate percentage)      %

Bequest to a Charitable Unitrust or a Charitable Annuity in my will/trust

Bequest to a Charitable Lead Trust with income to the Community Foundation Name

Bequest to my spouse, then the Community Foundation Name

Bequest to my children or others, then to the Community Foundation Name

Further description of gift (percentage of estate, property description, specific amounts, etc.):

Description

### 2. Life Insurance Policy:

Owner/Beneficiary  Beneficiary Only

Percentage/Amount        Primary Beneficiary  Contingent Beneficiary

Policy #:       Company      Type

### 3. Gifts that provide life income administered by:

Community Foundation Name  Another financial institution  Charitable Unitrust/Annuity Trust  
 Charitable Gift Annuity  Deferred Gift Annuity

Name of Financial Institution

Contact Information

Gift Description

### 4. Payable/Transfer on Death:

CD  Bonds  Mutual Funds  Retirement Plan

Percentage/Amount        Primary Beneficiary  Contingent Beneficiary

Percentage/Amount:

Policy #:       Company      Type

Attach additional pages if necessary to document multiple policies or beneficiary designations.

With the understanding that values are subject to change, at this time we project the value of our future provision to the Community Foundation Name to be approximately: $

Please treat this projected value as confidential information to be used for internal purposes only.

The Community Foundation Name would appreciate notice of any changes in the above provisions that might be made in the future.

Our/My gift is unrestricted

Please designate our/my gift to benefit the following organizations or projects supported by Community Foundation Name: Specific organization/project

Attachments or letters that further describe the listed provision(s) are encouraged and appreciated, i.e. a copy of the section of your will, trust agreement, or other document containing the provision(s). Designated gifts are subject to change if the organization or project becomes obsolete.

### PUBLICITY/RECOGNITION

We (I) authorize the Community Foundation Name to include our (my) gift in recognition societies, web site, newsletters, etc. as a motivation for others to leave a future gift to benefit the Community Foundation Name. We (I) wish our name(s) to appear as:      .

Do not publish our/my name(s) on any donor list, this is an anonymous gift.

### SIGNATURE OF DONOR(S)

DONOR DATE DATE OF BIRTH

DONOR DATE DATE OF BIRTH

### ADDITIONAL BENEFICIARIES INVOLVED IN ESTATE GIFT ARRANGEMENT

NAME DATE OF BIRTH

CHARITY LOCATION

NAME DATE OF BIRTH

CHARITY LOCATION

### EXECUTOR(S) OR TRUSTEE(S) OF ESTATE

Name  
Contact Info

Name

Contact Info

### PROFESSIONAL ADVISORS (Attorney/CPA/Fin. Planner)

Name  
Contact Info

Name  
Contact Info

Name  
Contact Info

Please return completed form to: Community Foundation

Address, Phone, Fax

Contact Name, Contact Email