**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.

## COMMUNITY FOUNDATION LETTER OF INTENT

It is our (my) desire to leave a legacy of support to the Community Foundation Name and we (I) inform the Foundation that we (I) have made a provision for a gift to the Foundation in our (my) estate plan. We (I) understand that this commitment is revocable and can be modified by us (me) at any time.

Name, Date of Birth

Second Name (If Joint Gift), Date of Birth

Address, City, State, Zip

Phone, Fax, Email

It is our (my) intent to leave a legacy to the Community Foundation Name through our (my):

Will  Retirement Plan Assets  Life Insurance Policy

Living Trust  Charitable Remainder Trust  Other

We (I) wish to inform the Community Foundation Name, for long-term planning purposes only, that as of this date, the value of our (my) gift is:      .

(If your gift is a percentage of your estate, please indicate the approximate present value of that percentage.)

We (I) understand that, by stating an amount, our (my) estate is not legally bound by this statement and we (I) may choose to add, subtract, or revoke this bequest at any time, at our (my) discretion. (The Community Foundation Name requests notification any time you make changes or adjustments to your gift.)

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

Please enroll us (me) in the Community Foundation Name Legacy Society under the following condition:

You may publish our (my) name(s) among your lists of Legacy Society members as a motivation for to leave a future gift to benefit our community. We (I) wish our (my) name(s) to appear as:

Do not publish our (my) name(s) on any donor list, this is an anonymous gift.

DONOR SIGNATURE DATE

DONOR SIGNATURE DATE

It is also helpful for us to have on file any supporting documentation that you may be able to share with us.