

Confidential Statement of Intent



I/We have made a provision in our estate as follows:

Donor Information

Name (please print) _____ Date of Birth ____/____/____
Name (please print) _____ Date of Birth ____/____/____
Address _____
City _____ State _____ Zip _____
Telephone _____ Email _____

Description of Gifts and Option Gift Information

Attached please find a copy of the legal documents pertinent to this gift.

The approximate anticipated value of this gift is \$ _____

- | | |
|---|--|
| <input type="checkbox"/> Bequest in will or trust | <input type="checkbox"/> Charitable Remainder Trust |
| <input type="checkbox"/> Beneficiary of life insurance plan | <input type="checkbox"/> Real Estate |
| <input type="checkbox"/> Beneficiary of retirement plan | <input type="checkbox"/> Tangible Personal Property (describe) |
| <input type="checkbox"/> Other: _____ | _____ |

Donor Recognition

We periodically publish lists of donors who have made planned gifts. We hope this will encourage others to make similar gifts. We would be honored to list your name unless you prefer to remain anonymous. All details about the amount of type of gift will remain confidential.

- Please list my/our name (s) as follows:

- Please do not publish my/our name (s) in connection with this gift.

Signature (s)

In the case of a revocable gift, this statement of intent does not constitute a legally binding pledge or agreement for me or for my estate/ It documents only my intent, and may be amended.

Signature _____ Date of Birth ____/____/____
Signature _____ Date of Birth ____/____/____