



Your Organization Name
12345 Main Street
Anytown, USA 00000
555-555-5555
Success@PlannedGiving.com

Your planned gift is a meaningful expression of your values. By documenting your intention, you ensure your wishes are honored exactly as you envision — regardless of staff or leadership changes in the years ahead. This simple step protects your legacy and ensures your impact endures for generations to come.

My legacy gift — in my will or beneficiary designation — is in the amount of:

\$ _____ or _____ %.

- ☐ I prefer not to disclose the amount of my legacy gift, but I am pleased to know that my gift will benefit (Organization Name).

I am ready to:

- ☐ Make a bequest to (Organization Name) in my will.
☐ Make (Organization Name) the beneficiary of a retirement fund.
☐ Make (Organization Name) the beneficiary of a life insurance policy.
☐ Create a charitable trust and name (Organization Name) as a beneficiary.
☐ Make a legacy gift to (Organization Name) not listed here. Please describe:

I'm interested! Tell me more.

- ☐ I would like to receive a personalized illustration of what my payments would be if I were to make "a gift that pays me back" (a charitable gift annuity).
☐ I am interested in making a legacy gift, but I have questions.
☐ Please count my previous gift toward any current match or challenge opportunity.

This letter of intent represents my commitment to the future of (Organization Name):

Signature: _____

Name (please print): _____

Date: _____

Address: _____

City, State, Zip: _____

Phone: _____

Email: _____

Please contact Jane Doe for more information at Success@PlannedGiving.com