



LETTER OF INTENT FOR A PLANNED GIFT

New Intention Updated Intention

Name

Address

City

State

Zip

I wish to provide a planned gift of support and have made a provision for a gift to Elwyn, Inc. in my estate plans. It is my intention to leave a planned gift to Elwyn through my:

- Will or Trust
- Charitable Lead Trust
- Life Insurance Policy
- Retirement Plan/Beneficiary Designation (401(k), 403(b), IRA, Brokerage Account)
- Charitable Remainder Trust
- Donor Advised Fund Remainder
- Other Asset(s) (please describe): _____

I would like to inform Elwyn, Inc., for long-term planning purposes only, that, as of this date, the estimated value of my/our gift is \$_____ or _____% of my/our estate. I/We understand that my/our estate is not legally bound by this statement and at any time I/we may choose to add, subtract, or revoke Elwyn, Inc. as beneficiary of this planned gift.

Gift Purpose:

- Unrestricted Unrestricted Endowment Other: _____

Recognition:

Donors who include Elwyn, Inc. in their estate plans will be enrolled in the **1852 Society**.

- Please list my name as follows: _____
- I prefer no public recognition.

Signature

Date



YOUR GIFT MATTERS

YOUR WORDS MATTER

There are others who share your passion for Elwyn and the people we support—would you help inspire them? By sharing why you give, you can help someone envision the lasting impact of planned giving and encourage a transformational gift of their own.

I MADE A TRANSFORMATIONAL GIFT TO ELWYN BECAUSE:

I HOPE THAT MY GIFT:

THANK YOU!

Elwyn, 111 Elwyn Road , Elwyn, PA 19063