

# Letter of Intent for a Planned Gift



New Intention     Updated Intention

Name: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

## Preferences:

I/We wish to provide a planned gift of support and have made a provision for a gift to Elwyn in my/our estate plans. It is my/our intention to leave a planned gift to the League through my/our:

- |   |  |
|---|--|
| <input type="checkbox"/> Will or Trust  | <input type="checkbox"/> Charitable Remainder Trust              |
| <input type="checkbox"/> Charitable Lead Trust  | <input type="checkbox"/> Donor Advised Fund Remainder            |
| <input type="checkbox"/> Life Insurance Policy  | <input type="checkbox"/> Other Asset(s) (please describe): _____ |
| <input type="checkbox"/> Retirement Plan/Beneficiary Designation<br><i>(401(k) 403(b), IRA, Keogh, Brokerage Account)</i> |  |

I/We would like to inform Elwyn, 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 as beneficiary of this planned gift.\*

## Gift Purpose:

- Unrestricted     Unrestricted Endowment
- Other (Please indicate below – briefly describe the program or fund you would like your gift to benefit. If multiple areas, please provide percentages or specific amounts).  
[An unrestricted gift allows your donation to go where it is needed most.](#)
- \_\_\_\_\_
- \_\_\_\_\_

## Recognition:

- Donors who include Elwyn in their estate plans will be enrolled in Elwyn's 1852 Society.  
Please list my/our name(s) as follows: \_\_\_\_\_  I/We prefer no public recognition

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

*\*Elwyn greatly appreciates notification in the event that you make a change or adjustment to this gift.*

# Your Gift Matters

## **YOUR WORDS MATTER**

Please help us inspire others to create a lasting legacy. When you share your reasons for giving, your words may help someone envision the joy of planned giving to Elwyn and decide to make a transformational gift of their own.

**I Made A Transformational Gift To Elwyn Because:**

**I Hope That My Gift:**

Thank You!



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