

# Letter of Intent for a Future (Estate) Gift

As evidence of my/our desire to provide a legacy of support to the Lac du Bonnet & District Charitable Foundation, I/we hereby inform the Lac du Bonnet & District Charitable Foundation that I/we have made a provision for a gift to the Foundation in my/our estate plan. I/we understand that this commitment is revocable and can be modified by me/us at any time.

Name \_\_\_\_\_ Date of Birth \_\_\_\_\_ Second Name (if joint gift) \_\_\_\_\_ Date of Birth \_\_\_\_\_  
Address \_\_\_\_\_ City \_\_\_\_\_ Prov \_\_\_\_\_ Post Code \_\_\_\_\_  
Phone \_\_\_\_\_ Fax \_\_\_\_\_ E-mail \_\_\_\_\_

It is my/our intent to leave a legacy to the Lac du Bonnet & District Charitable Foundation through my/our:

- Will  Retirement Plan Assets  Life Insurance Policy  
 Living Trust  Charitable Remainder Trust\* \_\_\_\_\_  Other \_\_\_\_\_

We wish to inform the Board of the Lac du Bonnet & District Charitable Foundation, for long-term planning purposes only, that as of this date, the value of my/our gift is: \$\_\_\_\_\_.\*\* (If your gift is a percentage of your estate, please indicate the approximate present value of that percentage.) We understand that, by stating an amount, my/our estate is not legally bound by this statement and I may choose to add, subtract, or revoke this bequest at any time, at my/our sole discretion. (The Lac du Bonnet & District Charitable Foundation requests notification any time you make changes or adjustments to your gift.)

Please designate this gift to benefit the following endowment program, or to "where the Board determines is best for the Community":

Please enroll me/us in the Lac du Bonnet & District Charitable Foundation as Heritage Members of the Legacy club as under the following conditions:

- Feel free to publish my/our name(s) among your lists as Heritage Society members as a motivation for others to leave a future gift to benefit the Lac du Bonnet & District Charitable Foundation. I/we wish my/our names(s) to appear as:

Do not publish my/our names on any donor roster (this is an anonymous gift).

Date \_\_\_\_\_ Donor(s) Signature(s) \_\_\_\_\_

\* If your CRT beneficiary designation is irrevocable, please enclose a copy of the trust document for enrollment in an additional recognition society.

\*\* We hope that you will share the approximate amount of your gift with us so that the benefiting college or program will know of your generosity and be able to recognize you appropriately. It is also helpful for us to have on file any supporting documentation which you may be able to share with us. Please attach if possible.



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