

# Letter of Intent for a Planned Gift

- New Intention       Updated Intention

NAME(S) \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_

STATE \_\_\_\_\_

ZIP \_\_\_\_\_

PHONE \_\_\_\_\_

E-MAIL \_\_\_\_\_

## PREFERENCES

I/We wish to provide a planned gift of support and have made a provision for a gift to the Bill of Rights Institute in my/our estate plans. It is my/our intention to leave a planned gift to the Institute 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>(401(k) 403(b), IRA, Keogh, Brokerage Account) |  |

I/We would like to inform the Bill of Rights Institute, 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 the Bill of Rights Institute as a beneficiary of this planned gift.\*

### Gift Purpose:

- Unrestricted
- Unrestricted Endowment **An unrestricted gift allows your donation to go where it is needed most.**
- 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.)
- \_\_\_\_\_
- \_\_\_\_\_

## RECOGNITION

Donors who include the Institute in their estate plans will be enrolled in the James Madison Legacy Society.

- Please list my/our name(s) as follows: \_\_\_\_\_
- I/We prefer no public recognition

SIGNATURE \_\_\_\_\_

DATE \_\_\_\_\_

SIGNATURE \_\_\_\_\_

DATE \_\_\_\_\_

\*The Bill of Rights Institute greatly appreciates notification in the event that you make a change or adjustment to this gift.

# We Want to Hear from You

## YOUR GIFT MATTERS

There are other passionate civic education supporters like you; would you like to help us inspire them?

When you share your reasons for giving, your words may help someone envision the joy of planned giving and decide to make a transformational gift of their own.

**I made a transformational gift to the Institute because:**

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**I hope that my gift:**

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**Thank you!**