

# Estate Intention Form

*This is a confidential record.*

In order that we may include you in our planned giving society, value your future gift for any campaign purposes and properly thank you and acknowledge your gift, please fill out the following information which applies to your future gift of a bequest through your Will or Trust.

If you would prefer to fax or mail this information to us, please print this page.

**Public** - I look forward to talking with you about this gift intention. I understand that listing this gift may be an incentive for others to give and I am willing to be publicly acknowledged.

**Confidential** - I understand you would like to contact me and I would be happy to discuss this with you but I prefer not to be listed or acknowledged publicly.

My Will/Trust was signed on:

- My Will/Trust provides that  % shall be bequeathed to Long Beach Rescue Mission Foundation through my estate. As of today's date, I estimate the value of this provision in my estate plan would be approximately \$.

- My Will/Trust provides that a specific dollar amount of \$ shall be bequeathed to Long Beach Rescue Mission Foundation through my estate.

- My Will/Trust provides that certain items of real or personal property shall be bequeathed to Long Beach Rescue Mission Foundation through my estate. The items are as follows:


As of today's date, I estimate these items to be worth approximately \$.

My Will/Trust indicates that the bequest through my estate is unrestricted.

My Will/Trust directs the Long Beach Rescue Mission Foundation to use my bequest through my estate for a specific purpose.

The specific purpose is as follows:


I understand that I am not making a legal, or binding, commitment upon my estate by submitting this Estate Intention Form. Further, Long Beach Rescue Mission Foundation should understand that the size of my future gift might be significantly different from the amount estimated above for the purposes of valuation in any campaign. If for any reason in the future Long Beach Rescue Mission Foundation is no longer included in my estate plan, I will notify you so that you can update your records and remove me from the planned giving society.

Donor Name:

Phone Number:

Date: