

# Planned Gift Intention Form

The following form allows donors to indicate their planned giving intentions, making your organization aware of future gifts. If team members conduct personal visits with planned giving prospects, this form can serve as a "pledge card" on the visits.

To request a Microsoft Word version of this document that you can customize for your use, please contact the Foundation at [info@rcfstl.org](mailto:info@rcfstl.org).

I am pleased to inform <<Organization>> that I intend to provide a legacy of support by making a planned gift through my:

- Will or trust
- Retirement account (Beneficiary Designation)
- Life insurance (Beneficiary Designation)
- Marketable securities
- Other\_\_\_\_\_

I want to direct my gift to:

\_\_\_\_\_ Endowment Fund.  
\_\_\_\_\_ Endowment Fund.

As of this date, the approximate value of my gift is \$\_\_\_\_\_.

This intention is not legally binding and may be modified or revoked at any time.  
<<Organization>> kindly requests notification any time you make changes or adjustments to your gift.

YES  NO I grant permission for my name to be used in promotional materials to inspire others to establish planned gifts.

\_\_\_\_\_  
Signature Date

\_\_\_\_\_  
Signature Date

\_\_\_\_\_  
Name Date of Birth

\_\_\_\_\_  
Name Date of Birth

\_\_\_\_\_  
Address City/State/Zip

\_\_\_\_\_  
Mobile Email(s)