

Letter of Intent for Deferred Gifts

As evidence of my desire to provide future support to the Education Foundation of Sarasota County, I hereby inform the Education Foundation that I have made a provision for a gift to your organization in my estate plans.

It is my intent to leave a legacy to the Education Foundation of Sarasota County through my:

Will or Living Trust

My Will or Trust was validly executed in the state of _____

on _____.

Attorney's name and address: _____

Retirement Plan or Investment Account Beneficiary Designation

Administrator/Custodian: _____

Primary Designation: Yes No

Charitable Remainder Trust/Charitable Lead Trust

Duration: _____ Rate: _____

Attorney's name and address: _____

I estimate the current value of my deferred gift to be approximately \$_____.

I understand that by stating an amount, my estate is not legally bound by the statement, and I may choose to add, subtract, or revoke this gift at anytime at my sole discretion.

Name(s) (as you would like to appear in recognition): _____

Please keep my/our name(s) anonymous.

Signature(s)*: _____

*required field

Address: _____

City: _____ State: _____ Zip: _____

Point of Contact (Executor, Family Member, etc): _____

Date: _____