

## Non-Binding Statement of Intent to Make a Future Gift

Because of my/our special regard for the Agnesian HealthCare Foundation, and realizing the importance of future gifts to the mission of the Agnesian HealthCare Foundation, I/we have made the following provision(s) for the Agnesian HealthCare Foundation as part of my/our estate plan(s):

### Donor Information

Donor Name: \_\_\_\_\_ Donor Date of Birth: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

Donor Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

### Gift Method (Please check at least one item in this section.)

- ☐ Will (Bequest)
- ☐ Living or Revocable Trust
- ☐ Beneficiary Designation: ☐ Primary Beneficiary ☐ Secondary Beneficiary
- ☐ Life Insurance
- ☐ Bank or Brokerage Account \_\_\_\_\_
- ☐ Retirement Plan (IRA, 403-b, etc.) \_\_\_\_\_
- ☐ Outside Managed Charitable Trust
- ☐ Trustee \_\_\_\_\_
- ☐ Charitable Remainder Trust \_\_\_\_\_
- ☐ Charitable Lead Trust \_\_\_\_\_
- ☐ Other \_\_\_\_\_

### Gift Details (Please check at least one item in this section.)

- ☐ Gift of a specific amount \$ \_\_\_\_\_
- ☐ Gift of a specific item of property \_\_\_\_\_
- Approximate current value of this gift is \$ \_\_\_\_\_
- ☐ Gift of a percentage of residue \_\_\_\_\_ %
- Approximate current value of this gift is \$ \_\_\_\_\_
- ☐ Contingent Gift (describe contingency) \_\_\_\_\_

### Purpose of Gift (Please check at least one item in this section.)

- ☐ This is an unrestricted gift to the Agnesian HealthCare Foundation.
- ☐ This is an unrestricted gift to \_\_\_\_\_  
(the Agnesian HealthCare Foundation Entity)
- ☐ This gift is to be used for the following purpose or program: \_\_\_\_\_
- ☐ If you name the Agnesian HealthCare Foundation in your will or trust, we would appreciate receiving a copy of the portion of your estate planning document that pertains to your gift to the Foundation. This provides us with the opportunity to acknowledge your gift and ensure that it is directed according to your intentions.

**I/We understand that this is not a legal or binding commitment on my/our estate and that the actual value of any future gift may be different than the amount estimated herein. Should my/our intent change from that stated above, I/we will notify the Foundation so it may update its records accordingly.**

Printed Name: \_\_\_\_\_ Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

Printed Name: \_\_\_\_\_ Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_