



Letter of Intent Guidelines

Feel free to choose the name for this document. Communities have used: Letter of Intent, Letter of Commitment, Declaration of Intent, Declaration of Commitment; Promise; Confirmation of Commitment

Please include the following components:

Identification

The Letter of intent must include your logo, contact person, your organization's name, phone and email address in addition to the LIFE & LEGACY™ logo.

The Commitment

- I/We have already made a provision in my/our estate plan
- I/We shall make a provision in my/our estate plan within the next _____ months (must be 12 or less)
- Listing of Ways to Give:
 - Gift in Will
 - Gift in Trust
 - Retirement Account
 - Life Insurance Policy
 - Cash
 - Assets: real estate, business interest, stocks
 - Gifts that produce lifetime income (if offered in your community)
 - Gifts that produce income to heirs (if offered in your community)
 - Other _____
- Space for gift amount, percentage, or value
- List of all participating organizations with check boxes (check all that apply) (include "other")
- Signature and date

Contact Information

- Name/Names
- Address, Email, Phone, Birthdate

Permission

- To encourage others to make commitments to the future, I/We permit my/our name to be listed with other donors. Name as it is to be printed in listing_____
- I/We prefer to remain anonymous at this time

Consider including the following:

- Consider if you want to offer donors specifics about the publications for listing names
- Language that ties Judaism with the idea of leaving a legacy
- On the back, listing all organizations in the community with check boxes so donors will be encouraged to consider those organizations not participating in the program for legacy commitments too
- Codicil and/or bequest language
- Not legally binding statement, for example: this Letter of Intent is not a legal obligation and may be changed at donor's discretion
- Website for Legacy information
- "contacted by" so everyone knows who had the original conversation

Please review the samples on our website Resources section