



Letter of Intent for Estate Gift

I/we desire to provide for the future well-being of Stonehill Benevolent Foundation through a provision in my/our estate plans, and with this letter we are informing Stonehill Benevolent Foundation of our plans. I/we understand that my plans can be revoked or modified by me/us at any time.

Name

Name

Address, City, State, Zip

Phone

Fax

Email

I/we have made a provision to leave a legacy to Stonehill Benevolent Foundation through my/our:

☐ Will

☐ Retirement Plan or IRA

☐ Other

☐ Living Trust

☐ Life Insurance Policy

☐ I/we wish to inform Stonehill Benevolent Foundation, for long-term planning purposes only, that the current value of my/our future gift is: \$ _____. (This amount is kept confidential; if your gift is a percentage of your estate, please indicate the approximate value.) I/we understand that by stating an amount my/our estate is not legally bound by this statement and that I/we may choose to add, subtract, or revoke this bequest at any time, at my/our sole discretion.

To arrange a bequest from your will or trust(s) simply contact your estate-planning attorney to create or amend necessary legal documents. Below is an example of bequest language that might be used:

"I give, devise and bequeath to Stonehill Franciscan Services via the Stonehill Benevolent Foundation located at 3485 Windsor Ave. Dubuque, IA, who has a tax identification number of **42-1337556**, the sum of \$ _____ or _____% of my residue of my estate."

☐ You may publish my/our names, without any dollar amounts, in your lists of Legacy Society members as a motivation for others to leave a future gift to benefit the Stonehill Benevolent Foundation

☐ I/we do not want my/our names published.

Change Your Mind at Any Time

We realize that circumstances change, and the bequest to us in your will or trust may no longer be possible at some future date. Your family and friends come first, and that's why a bequest works for so many of our supporters—you can change your mind at any time.

For questions about planned gifts or other donations please contact Tracy Connolly, Director of Community Relations and Mission Advancement at 563.690.9660 or tconnolly@stonehilldbq.com.

Date

Signature

Signature (if applicable)