



**Confidential Intention of Future Philanthropy
Non-Binding**

Name: _____ **Date of Birth:** ___/___/___ (optional)

Spouse's Name: _____ **Date of Birth:** ___/___/___ (optional)

Home Phone: _____ **Work Phone:** _____

Email: _____ **Other:** _____

This Intention of Future Philanthropy is an expression of my plans to include The Lakeland Foundation in my estate plans. I understand that this is a nonbinding declaration of intent and that any information shared with The Lakeland Foundation is confidential. Realizing that circumstances may change for my family and loved one, I will notify The Lakeland Foundation if I need to modify my gift.

I/we have made a charitable contribution to The Lakeland Foundation in our estate plan through:

- | | |
|--|--|
| _____ Bequest* in a Will or Trust
(\$5,000 and above) | _____ Life Insurance |
| _____ Charitable Gift Annuity
(\$10,000 and above) | _____ Charitable Trust
(describe) _____ |
| _____ Retirement Plan | _____ Other
(describe) _____ |

*** Type of Bequest:**

_____ Specific Amount _____ Percent of estate _____ % Remainder of estate

The approximate amount of my/our bequest, based on today's value, is \$ _____

We would like our gift to be: [] used for Lakeland's priority (area of greatest need), or [] for the following purpose: _____

I/we would like to be recognized publicly as a member of the Legacy Society, we would like our name(s) to be listed as: _____

_____ Prefer *name(s)* to remain anonymous. _____ Prefer *gift* to remain anonymous.

Signature: _____ **Date:** _____

Spouse's Signature (if applicable): _____

Attorney/Advisor Name (optional)

Work Phone