



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

Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ (optional)

Spouse's Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ (optional)

Preferred Phone #: \_\_\_\_\_ Email: \_\_\_\_\_

**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), as follows:

Specific amount: \$ \_\_\_\_\_ Percentage of estate: \_\_\_\_\_% Remainder of estate: \_\_\_\_\_%

Retirement Plan

Life Insurance

Charitable Trust (describe): \_\_\_\_\_

Other (describe): \_\_\_\_\_

**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. Please list my/our name(s) as follows:**

\_\_\_\_\_

I/we prefer *name(s)* to remain anonymous.

I/we prefer *gift* to remain anonymous.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Spouse's Signature (if applicable): \_\_\_\_\_

Attorney's/Adviser's Name (optional): \_\_\_\_\_ Adviser's Phone: \_\_\_\_\_

*For questions or further assistance, please contact executive director John McCreery at 440.525.7086 or*

*jmccreery1@lakelandcc.edu. **Please return this form to The Lakeland Foundation, Lakeland Community College, 7700 Clocktower***

***Drive, Kirtland, OH 44094.***