
Letter of Intent for Estate Giving

Donor Information

Date: _____

Name/s: _____

Company (optional): _____

Address: _____

City/State/ZIP: _____

Email: _____ Phone: _____

Statement of Intent

I hereby inform Dance Vision Foundation of my intention to include the Foundation in my estate plans. This letter is an expression of my intent and is not legally binding. I understand this information will be held in confidence and used solely for planning and acknowledgment purposes.

Gift Information

I have included Dance Vision Foundation in my estate plans through the following method(s):

Bequest in Will or Living Trust

Beneficiary designation
of a Retirement Plan (e.g., IRA, 401(k))

Life Insurance Policy Beneficiary

Charitable Remainder Trust (CRT)

Charitable Lead Trust (CLT)

Donor-Advised Fund (DAF)
residual designation

Transfer on Death (TOD) or
Payable on Death (POD) Account

Other (please describe): _____

Estimated Gift Amount or Percentage (optional):

\$_____ or _____% of estate

Purpose of Gift (choose one):

Unrestricted - to be used where most
needed

Restricted - for the following
program or purpose: _____

(Note: The Foundation encourages donors to contact us if
considering a restricted gift to ensure intent can be fulfilled.)

Is this gift contingent?

(e.g., only if other heirs predecease you)?

Yes

No

Unsure

Acknowledgement Preferences:

I would like my name to be recognized publicly.

I wish to remain anonymous.

SIGNATURE OF DONOR

DATE