

# SAMPLE Estate Intention Form

This is a confidential record. In order that we may include you in our planned giving society, value your future gift for any campaign purposes and properly thank you and acknowledge your gift, please fill out the following information which applies to your future gift of a bequest through your Will or Trust.

***Please check one:***

- I look forward to talking with you about this gift intention. I understand that listing this gift may be an incentive for others to give and I am willing to be publicly acknowledged.
- I understand you would like to contact me and I would be happy to discuss this with you but I prefer not to be listed or acknowledged publicly.
- I understand you would like to contact me but I prefer to remain anonymous and request no contact or acknowledgment.

My Will/Trust was signed on: \_\_\_\_/\_\_\_\_/\_\_\_\_.

***Please complete the appropriate sections:***

- My Will/Trust provides that \_\_\_\_\_% shall be bequeathed the Peter Britt Gardens Music and Arts Festival Association through my estate. As of today's date, I estimate that the value of this provision in my estate plan would be approximately \$ \_\_\_\_\_.
- My Will/Trust provides that \$ \_\_\_\_\_ shall be bequeathed to the Peter Britt Gardens Music and Arts Festival Association through my estate.
- My Will/Trust provides that certain items of real or personal property shall be bequeathed to the Peter Britt Gardens Music and Arts Festival. The items are as follows:

As of today's date, I estimate these items to be worth approximately \$ \_\_\_\_\_.

\_\_\_\_\_

- My Will/Trust indicates that the bequest through my estate is unrestricted.
- My Will/Trust directs the Peter Britt Gardens Music and Arts Festival to use my bequest through my estate for a specific purpose. The specific purpose is as follows:

TBD

I understand that I am not making a legal, or binding, commitment upon my estate by submitting this Estate Intention Form. Further, the Peter Britt Gardens and Arts Festival Association should understand that the size of my future gift might be significantly different from the amount estimated above for the purposes of valuation in any campaign. If for any reason in the future the Peter Britt Gardens Music and Arts festival Association is no longer included in my estate plan, I will notify you so that you can update your records and remove me from the planned giving society.

Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

Signed:

\_\_\_\_\_  
(Donor)

\_\_\_\_\_  
(Printed Name)

\_\_\_\_\_  
(Donor)

\_\_\_\_\_  
(Printed Name)

Peter Britt Gardens Music and Arts Festival Association Representative:

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Title)