

# Legacy Gift Intention Form (Confidential)



## PERSONAL INFORMATION

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Name: Birthdate:  
Name: Birthdate:  
Address:  
City: State: Zip:  
Phone: Email:

## GIFT DESCRIPTION

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I/We have named Prince of Peace Lutheran Church as a beneficiary of my/our:

Will/Living Trust     Charitable Remainder Trust     Retirement Assets     Life Insurance Policy     Charitable Gift Annuity

Other (please explain)

Brief description of the gift to Prince of Peace (percentage of estate/asset, specific amount, description of property etc.)

This is a contingent gift, meaning that Prince of Peace is an alternate beneficiary and will only receive the gift under certain circumstances. Please describe any contingent arrangements:

As of today's date, I/we estimate the value of this provision in my estate plans to be \$

## PURPOSE OF YOUR GIFT

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Please share with us the reason you want to make such a meaningful gift to Prince of Peace:

New Intention: This is a new gift intention.

Update to Intention: This is an update to a previously recorded gift intention.

I want my gift to be used for the highest priorities at Prince of Peace.

I want my gift to be used for a specific purpose (if allocated to a named fund, please list fund name below.)

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## GIFT RECOGNITION

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Please recognize me/us as:

**I prefer to remain anonymous.**

## GIFT DOCUMENTATION

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Attached is a copy of the relevant portions of the legal documents relating to my/our future gift to Prince of Peace and/or a letter from my legal or financial advisor that describes the nature and purpose of the gift (optional).

## CONTACT INFORMATION (OPTIONAL)

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**Will or Trust** – If your gift is included in a will or trust, please provide the following: Executor(s) or Trustee(s)

Name: \_\_\_\_\_ Phone and/or  
Email: \_\_\_\_\_

Address: \_\_\_\_\_

**Beneficiary Designation** – If your gift is directed by a beneficiary designation, please provide the following: Administrator or Company

Name: \_\_\_\_\_ Phone and/or  
Email: \_\_\_\_\_

Address: \_\_\_\_\_

**Other Information, Contacts and Relationships You Want Us to Know (family, attorney, etc.):**

Name: \_\_\_\_\_ Phone and/or Email: \_\_\_\_\_

Address: \_\_\_\_\_

I/We understand that this is not a legal or binding commitment on my/our estate. I/We understand that any gift received by Prince of Peace from my/our estate shall be subject to Prince of Peace fee assessment policies in effect at the time.

Donor Signature \_\_\_\_\_ Date \_\_\_\_\_ Donor Signature \_\_\_\_\_ Date \_\_\_\_\_

Development Representative Signature \_\_\_\_\_ Date \_\_\_\_\_ Gift Planning Representative Signature \_\_\_\_\_ Date \_\_\_\_\_