

# 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:

|                                                 |                                                     |                                            |                                                |                                                  |
|-------------------------------------------------|-----------------------------------------------------|--------------------------------------------|------------------------------------------------|--------------------------------------------------|
| <input type="checkbox"/> Will/Living Trust      | <input type="checkbox"/> Charitable Remainder Trust | <input type="checkbox"/> Retirement Assets | <input type="checkbox"/> Life Insurance Policy | <input type="checkbox"/> Charitable Gift Annuity |
| <input type="checkbox"/> 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 |
|--------------------------------------|------|----------------------------------------|------|