



LETTER OF INTENT FOR FUTURE ESTATE GIFT

As evidence of my/our desire to provide a legacy of support to the Lexington Medical Center Foundation (the "Foundation"), I/we are using this document to inform the Foundation that I/we have made a gift to the Foundation in my/our estate plans. This commitment can be modified by me/us at any time.

Name(s)

Address City State Zip

Phone E-mail

It is my/our intent to leave a legacy to the Foundation through my/our:

- Will
- Revocable Charitable Remainder Trust
- Irrevocable Charitable Remainder Trust
- Retirement Plan Assets
- Life Insurance Policy
- Charitable Lead Trust
- Charitable Gift Annuity
- Other _____

I/we wish to inform the Foundation, for long-term planning processes only that as of this date, the value of my/our gift is \$_____. (If your gift is a percentage of your estate please indicate the approximate present value of that percentage.) I/we understand that, by stating an amount, my/our estate is not legally bound by this statement and I may choose to add, subtract or revoke this at my/our sole discretion.

It is my/our desire that this gift be used to:

- where the need is greatest OR to benefit the following _____

MEMBERSHIP

Individuals who notify the Foundation that they have made any arrangement for a planned gift of any size are members of The Heritage Society. Members of The Heritage Society who have established a planned gift of \$25,000 or more are inducted into The Hulon Society.

- Please enroll me/us in The Heritage Society.
- My legacy gift will be \$25,000 or greater, please **also** enroll me in The Hulon Heritage Society. Benefits will include invitations to the Foundation's annual Donor Appreciation event and special Hulon Heritage Society reception.

RECOGNITION AND PUBLICITY

- Please feel free to publish my/our name(s) among your list of Heritage Society and/or Hulon Society members as a motivation for others to leave a similar gift (the amount of your gift is not published).
- Please do not list my/our name (anonymous gift)

Date

Signatures
