

chicago foundation for women

Letter of Planned Gift Intent

I am pleased to notify Chicago Foundation for Women of the following gift or intention:

(Please check any that apply)

- I have included a bequest to the Foundation in my present Will (sample language on reverse side of this document).
- I have named the Foundation as the beneficiary of a life insurance policy or retirement account.

I have created a/an:

- Revocable trust
- Irrevocable trust to benefit the Foundation
- I have made another form of gift arrangement, effective upon my death.

(Kindly describe)

Approximate gift value (optional - dollar amount or percentage of estate):

- I intend for my gift to support:
- Endowment
- General Operations
- Other: _____

RECOGNITION

- You may publicly acknowledge and recognize this gift.
Please list my name as follows: _____

- Please treat this information as confidential and do not publicly acknowledge it at this time.

In telling you of my intention, I do not intend to create any legal obligation to Chicago Foundation for Women either personally or for my estate. It is simply a statement of my present intentions and I have the option to change my plans at any time. It is provided solely to assist the Foundation in its future development plans.

Full Name: _____

Address: _____

Signature: _____

Date: _____

Please return this completed form to Katy Thomas
kthomas@cfw.org or via fax: 312-577-2802
140 s. dearborn street, suite 400, chicago, il 60603

Chicago Foundation for Women Sample Bequest Language*

A bequest to Chicago Foundation for Women made through a provision in your will or revocable trust:

- Is easy to arrange.
- Will not alter your current lifestyle in any way.
- Can be easily modified to address your changing needs.

A bequest may be:

- Designated for a particular purpose or left unrestricted.
- Used to add to CFW's endowment fund (only the annual payout on which may be used)
- Given to honor the donor or memorialize a loved one.

SPECIFIC BEQUEST

"I give to Chicago Foundation for Women the sum of \$_____. *This gift shall be used for (state purpose) if and for so long as the Board of Directors of the Foundation determines that the need exists. If the Board of Directors of the Foundation shall determine at the outset or at a later time that the need does not exist, or no longer exists, or for some reason it is not possible (or prudent) for the bequest to be used as originally intended, the Board of Directors may, in its sole and uncontrolled discretion, direct the use of my bequest for a purpose related as closely as possible to that stated above.*"

RESIDUARY BEQUEST

"I give to Chicago Foundation for Women [*the residue of my estate / _____ % of the residue of my estate*]. *This gift shall be used for (state purpose) if and for so long as the Board of Directors of the Foundation determines that the need exists. If the Board of Directors of the Foundation shall determine at the outset or at a later time that the need does not exist, or no longer exists, or for some reason it is not possible (or prudent) for the bequest to be used as originally intended, the Board of Directors may, in its sole and uncontrolled discretion, direct the use of my bequest for a purpose related as closely as possible to that stated above.*"

CONTINGENT BEQUEST

If _____ is not living at the time of my death, I give to Chicago Foundation for Women [*the sum of \$_____/ the residue of my estate/ _____ % of the residue of my estate*]. *This gift shall be used for (state purpose) if and for so long as the Board of Directors of the Foundation determines that the need exists. If the Board of Directors of the Foundation shall determine at the outset or at a later time that the need does not exist, or no longer exists, or for some reason it is not possible (or prudent) for the bequest to be used as originally intended, the Board of Directors may, in its sole and uncontrolled discretion, direct the use of my bequest for a purpose related as closely as possible to that stated above.*"

*We are happy to answer any questions you might have and encourage you to consult with your financial advisor or estate planner.