



**Letter of Intent for your
Lutheran Home & Harwood Place Future Estate Gift**

I/We _____ have made a provision in my/our estate plans for a deferred gift in support of the Lutheran Home & Harwood Place.

Type of Gift (please check box):

- | | |
|---|---|
| <input type="checkbox"/> A Charitable Remainder Trust | <input type="checkbox"/> Retirement Plan Assets |
| <input type="checkbox"/> A Gift of Securities | <input type="checkbox"/> A Life Insurance Beneficiary Designation |

Other, please specify: _____

Gift Details (as applicable):

Estimated value: \$_____ or Percentage allocation: _____%

Please note that completion of the value and percentage is optional, however it will help us to better plan for the future.

My/Our Gift Provides:

- Unrestricted support to the Lutheran Home Foundation benefitting the Lutheran Home and Harwood Place
- Restricted support to _____

Please consider providing the Lutheran Home Foundation with copies of documents that include details of your gift intentions.

Recognition:

All donors who have included the Lutheran Home Foundation in their plans are invited to the annual membership reception as well as a private gathering with Kathy Cavers, Lutheran Home & Harwood Place President & CEO.

() Please list me/us as a member(s) of the *1906 Society*.

Name to appear in recognition: _____

() I/We would like to remain anonymous.

Contact Information:

Name(s): _____

Address: _____

City, State, ZIP: _____

Email: _____

Phone: _____

Signature Date

Signature Date

Thank you for sharing this information to ensure that when the time comes, the Lutheran Home Foundation understands and can abide by your bequest intentions. Your plan will remain confidential.

Please return to:

Lutheran Home Foundation
8220 Harwood Avenue
Wauwatosa, WI 53213