



**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 estate 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

Lutheran Home Foundation TAX ID 39-1478794 | Phone 414-256-6836