

LETTER OF INTENT FOR A PLANNED GIFT.

United Way of
Northeastern MN



New Intention Updated Intention

NAME (S)

ADDRESS

CITY

STATE

ZIP

PHONE

EMAIL

PREFERENCES

I/We wish to provide a planned gift of support to United Way of Northeastern Minnesota (UWNEMN) in my/our estate plans. It is my/our intention to leave a planned gift to UWNEMN through my/our:

- | | |
|---|--|
| <input type="checkbox"/> Will or Trust | <input type="checkbox"/> Charitable Remainder Trust |
| <input type="checkbox"/> Charitable Lead Trust | <input type="checkbox"/> Donor Advised Fund Reminder |
| <input type="checkbox"/> Life Insurance Policy | <input type="checkbox"/> Other Asset(s) (please describe): |
| <input type="checkbox"/> Retirement Plan/Beneficiary Designation
(401(k), 403(b), IRA, Keogh, Brokerage Account) | _____ |

I/We would like to inform UWNEMN, for long-term planning purposes only, that, as of this date, the estimated value of my/our gift is \$ _____ or _____ % of my/our estate. I/We understand that my/our estate is not legally bound by this statement and at any time I/we may choose to add, subtract, or revoke UWNEMN as beneficiary of this planned gift.*

GIFT PURPOSE

- Unrestricted Unrestricted Endowment *An unrestricted gift allows your donation to go where it is needed most.*
- Other (Please indicate below - briefly describe the program or fund you would like your gift to benefit. If multiple programs or agencies, please provide percentages or specific amounts.)
- _____
- _____

RECOGNITION

Donors who include UWNEMN in their estate plans will be enrolled in UWNEMN's Legacy Society.

- Please list my/our name(s) as follows: I/We prefer no public recognition.

SIGNATURE

DATE

SIGNATURE

DATE



YOUR GIFT MATTERS

Your words matter.

There are other community members like you that care about improving the lives of children, families, and individuals across Northeastern Minnesota; would you help us inspire them?

When you share your reasons for giving, your words may help someone envision the joy of planned giving and decide to make a transformational gift of their own.

I made a transformational gift to United Way of NE MN because:

I hope that my gift:

THANK YOU!

United Way of
Northeastern MN



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