



## Letter of Intent for a Planned Gift

☐ New Intention

☐ Updated Intention

NAME(S)

ADDRESS

CITY

STATE

ZIP

PHONE

E-MAIL

### PREFERENCES

I/We wish to provide a planned gift of support and have made a provision for a gift to Beacon Academy in my/our estate plans. It is my/our intention to leave a planned gift to Beacon Academy through my/our:

☐ Will or Trust Charitable Lead

☐ Charitable Remainder Trust

☐ Trust Life Insurance Policy

☐ Donor Advised Fund Remainder

☐ Retirement Plan/Beneficiary Designation

☐ Other Asset(s) (please describe)

(401(k) 403(b), IRA, Keogh, Brokerage Account)

I/We would like to inform Beacon Academy, 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 Beacon Academy as the 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 areas, please provide percentages or specific amounts).

### RECOGNITION

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

☐ Please list my/our name(s) as follows:

☐ I/We prefer no public recognition

SIGNATURE

DATE

SIGNATURE

DATE

*\*Beacon Academy greatly appreciates notification in the event that you make a change or adjustment to this gift.*



## YOUR WORDS MATTER

There are other passionate educational equity advocates like you; 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 Beacon Academy because:**

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**I hope my gift:**

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## Thank you!

Thank you so much for your generous planned giving donation. Your support plays a vital role in helping us achieve our educational equity goals and make a meaningful impact in the lives of determined and inquisitive students from historically under-resourced and/or underrepresented communities. We are truly grateful for your commitment and support in our mission.