

Letter of Intent-Heritage Society (Confidential)

Thank you for your generous gift commitment to Luther Seminary. Your gift will help us plan for the future as we educate and inspire future leaders of Christian communities. Please take the time to fill out this form so we can better understand your intentions for your gift. The information you provide is not legally binding and we understand that you may wish to change your gift in the future.

Name(s): _____

Birth Year(s): _____

Address: _____

Phone: _____

Email: _____

About Your Gift

If you are willing to disclose more information about your gift, please check all that apply and estimate the value of each gift in today's dollars.

- | | |
|---|--|
| <input type="checkbox"/> Will | <input type="checkbox"/> Insurance |
| <input type="checkbox"/> Revocable Living Trust | <input type="checkbox"/> Real Estate |
| <input type="checkbox"/> Charitable Remainder Trust | <input type="checkbox"/> Retirement Plan/IRA |
| <input type="checkbox"/> Other Asset(s): _____ | |

You can indicate that your gift be used for Luther Seminary's priority areas or for a specific area(s) or program(s) that matters to you. Would you like your gift to be used for a specific purpose?

- Yes No

If you checked yes, please tell us how to direct your gift: _____

Luther Seminary uses charitable gifts to support Luther's priority areas unless otherwise specified.

Additional information: Is your gift contingent? Yes No

A contingent gift comes to Luther only if the other named beneficiaries do not survive you.

Please provide contact information for your executor, attorney, or financial adviser handling your estate:

Name: _____

Firm: _____

Address: _____

Phone: _____

Email: _____

Signature(s): _____ Date: _____

(Over)



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- You may publish my/our name(s) as Heritage Society members to inspire others.

Name(s) as you would like it/them to appear

- Please do not publish my/our name(s). I/we wish to remain anonymous.

Please return this form to Luther Seminary to the address below.

Why a Letter of Intent for a Future Estate Gift?

One of the common tools used in any planned giving program is a "Donor Letter of Intent for a Future Estate Gift." It is a simple document that is not legally binding, but records the expressed written intent of the donor(s) at the time they are making the commitment. Having this information on file is essential for managing and tracking your Planned Gift. Among other things, this information will allow us to understand your wishes and ensure that we can fulfill your wishes appropriately. In addition, it allows us to follow-up with family members, executor(s), or attorney(s) to make sure your wishes are fulfilled. If at any time you change the status of your estate gift to Luther Seminary, please let us know of that change so that we can update our records. Our goal is to properly steward your estate gift. Thank you again for your commitment to Luther Seminary.



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