



## Statement of Planned Gift Intention

### Personal & Confidential

*The Virginia War Memorial Foundation recognizes those who have helped secure its future by making gifts through their personal will or other gift arrangement. The Virginia War Memorial Foundation recognizes these friends as members of the **Legacy Society**.*

In support of the Virginia War Memorial Foundation, I/we intend to provide a gift through my/our estate as detailed. In order to properly record and acknowledge the gift, I am providing the following information about my/our estate plans:

Name(s): \_\_\_\_\_

Birthdate(s): \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Professional/Financial Advisor: \_\_\_\_\_

### TYPE OF GIFT:

I certify that it is my/our intent to provide a legacy gift through my/our (check all that apply):

Bequest

Charitable Gift Annuity

Charitable Remainder Trust

Retirement Plan Assets

Life Insurance Policy

Other: \_\_\_\_\_

**DESCRIPTION OF GIFT:**

Please describe the nature of your gift (percentage of estate, specific amount, property, etc.):

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Estimated present day value of gift: \_\_\_\_\_

**DOCUMENTATION OF GIFT**

- A copy of the provision is attached
- A copy of the provision will be sent once executed (*NOTE: A planned gift is not considered fully documented until a copy of the provision is received*)
- I/We prefer to reveal my/our plans at a later date

**Please indicate how you would like to be recognized in the Legacy Society list:**

- I/We prefer to remain anonymous
- I/We would like to be listed in the following way:\_\_\_\_\_

**Signature:**\_\_\_\_\_ **Date:**\_\_\_\_\_

**Signature:**\_\_\_\_\_ **Date:**\_\_\_\_\_

Thank you for your support. If you have any questions or are interested in learning about opportunities to name a fund, please call/email Mary-Michael Wachur, Director of Development at 804.786.2074 or [mmwachur@vawarmemorial.org](mailto:mmwachur@vawarmemorial.org)

*The Virginia War Memorial Foundation is a 50(c)(3) non-profit organization. All gifts are tax deductible as provided by the law. **Tax ID # 31-1647903***