



CONFIDENTIAL ESTATE BEQUEST LETTER OF INTENT

All information provided below will be treated strictly confidentially, will be used for Cole Valley Christian Schools internal purposes only, and is not considered to be a legal or financial obligation.

Cole Valley Christian Schools recognizes all those making long-term provisions for it or any of its programs as members of its Donor Recognition Society.

Please complete:

- My/our name/s may be published as a member(s) of the Donor Recognition Society
- I/we prefer to remain anonymous

Signature 1: _____ Date: _____

Print Name 1: _____

Signature 2: _____ Date: _____

Print Name 2: _____

Address: _____

City: _____ State: _____ Zip: _____

Telephone: _____ Email: _____

Please select one:

- Unrestricted gift
- Restricted gift. Please specify _____

Donor age: 65-69 70-74 75-79 80-84 85+

Please complete this section:

As an indication of my/our support for Cole Valley Christian Schools or one of its programs, I/we am pleased to confirm that I/we have made a provision for _____ (Cole Valley Christian Schools) as follows (select all that apply):

- Bequest in my/our Will
- Provision in my/our Revocable Living Trust
- Provisions in my/our Irrevocable Living Trust
- Establishment of a Charitable Remainder Trust
- Establishment of a Charitable Gift Annuity
- Beneficiary Designation in my/our Qualified Retirement Plan or Commercial Annuity
- Life Insurance Gift

- Endowment Fund
- Public Securities
- Closely Held Securities
- Cash
- Other _____

Description of the provision/s and what I would like my support to accomplish:

Document title (if one has been submitted) _____

Please Select one:

- A certified copy of the agreement has been received by the school. Date received _____
- A photo/digital copy of the agreement has been received by the school. Date received _____
- A copy of the agreement has not been received by the school.

I/we conservatively estimate the current value of my/our provision to be approximately \$_____. Cole Valley Christian Schools recognizes that values are subject to change and dependent upon unforeseen circumstances. This information will be used only to help Cole Valley Christian Schools project possible future financial support and is not considered a legally binding obligation.

I/we worked with the following advisor to establish the gift:

Name: _____ Profession: _____

Company/Address: _____

City: _____ State: _____ Zip: _____

Thank you for your transformational support!

