**Letter of Intent for a Planned Gift**

**Naming Klein UMC Foundation as Beneficiary**

***Please submit this form to the Klein UMC Foundation, c/o Klein UMC, 5920 FM 2920, Spring, TX 77388, Attn: Carol Davis***

***Questions: Contact Dana Croswhite at kfdcroswhite@gmail.com***

New Intention  Updated Intention

|  |
| --- |
| *Click or tap here to enter Name(s)* |
| *Click or tap here to enter Address* |
| *Click or tap here to enter Phone* |
| *Click or tap here to enter Email* |

**Preferences**

It is my/our intention to leave a planned gift to the Klein UMC Foundation through my/our:

Will or Trust  Charitable Remainder Trust

Charitable Lead Trust  Donor Advised Fund

Life Insurance Policy  Other Assets (please describe):

Retirement Plan/Beneficiary Designation *Click or tap here to enter “Other Assets” Info*

*(401(k), 403(b), IRA, Keough, Brokerage Account) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

I/We would like to inform the Klein UMC Foundation, for long term planning purposes only, that as of this date, the estimated value of my/our gift is as follows:

$ Amount: $ *Enter Amount* OR  % of my/our estate: *Enter %*

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 the Klein UMC Foundation as beneficiary of this planned gift.\*

**Recognition**

Donors who include the Klein UMC Foundation in their estate plans with a minimum $1,000 donation will be inducted into the 77 Society of the Klein UMC Foundation.

Please list my/our names as follows: OR  I/We wish remain anonymous.

*Click or tap here to enter Name(s)*

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Signature Date

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature Date

*\*The Klein UMC Foundation greatly appreciates notification in the event that you make a change or adjustment to this gift.*