

LETTER OF INTENT / WILLS SURVEY

TO: Thomas A. McCullough, Vice President of Endowment, Heart of America Council

I am pleased to notify the Heart of America Council of the following gift or intention:

(Please check any that apply)

___ I have included a bequest to the Council in my present Will.

___ I *intend* to change my Will in the near future to include a bequest to the Council.

___ I have named the Council as the beneficiary of an insurance policy on my life.

___ I *intend* to name the Council as the beneficiary of an insurance policy on my life.

___ I have created a: ___ Revocable trust ___ Irrevocable trust to benefit the Council

___ I *intend* to create a: ___ Revocable trust ___ Irrevocable trust to benefit the Council

___ I have already made another form of gift arrangement to be effective at my death. Please describe:

___ I *intend* to make another form of gift arrangement to be effective at my death. Please describe:

Approximate Gift Value \$ _____

Recognition ___ You may publicly acknowledge and recognize this gift.

___ Please treat this information as confidential and do not publicly acknowledge it at this time.

In telling you of my intention, I do not intend to create any legal obligation to the Council either personally or for my estate. It is simply a statement of my present intentions and I have the option to change my plans at any time. It is provided solely to assist the Council in its future financial plans.

Signature

Name

Address

City/State/Zip