



## LETTER OF DONOR INTENT

Dear KW Cares,

I/we are pleased to inform you that I/we have made provisions for a future gift to [Organization Name] through my/our estate plans. It is my/our intention that this gift will help sustain the mission and compassionate work of the organization for years to come.

While this commitment is revocable and may be modified should circumstances change, I/we share this intention so that [Organization Name] may understand my/our long-term support and continue planning for the future with confidence.

Please accept this letter as notification of my/our current plans.

### DONOR INFORMATION

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

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

City, State, ZIP: \_\_\_\_\_

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

Birthday: \_\_\_\_\_ Spouse Birthday (if applicable)  
\_\_\_\_\_

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

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

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### TRUSTEE OR EXECUTOR INFORMATION

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

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

City, State, ZIP: \_\_\_\_\_

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

## **LEGACY SOCIETY INFORMATION**

### **Gift Information (Optional)**

I/we have included KW Cares in my/our estate plans through the following:

- Bequest in my/our will or trust
- Beneficiary designation (life insurance, retirement plan, or financial account)
- Charitable remainder trust
- Charitable gift annuity
- Other: \_\_\_\_\_

Estimated value of gift (optional):

- I/we prefer not to disclose
- Approximate amount or percentage: \_\_\_\_\_

Purpose of Gift (optional):

- Unrestricted – to be used where the need is greatest
- Restricted to the following program or purpose: \_\_\_\_\_

### **Recognition**

- I/we are happy to have my/our name(s) listed as part of the **KW Care Legacy Society**

Name(s) as you would like them recognized:

\_\_\_\_\_

- I/we prefer to remain anonymous.

\_\_\_\_\_

**Important Notes:**

This letter of intent is not a legal or binding obligation. Its purpose is simply to document my/our current plans and commitment to supporting **KW Cares** in the future.

Please be aware that we do not proactively contact beneficiaries upon the account holder's passing, nor do most financial firms. If you choose to designate KW Cares as a beneficiary of any account not included in your will, we ask that you notify us. This ensures that we are aware of your intention and able to carry out your wishes.

By notifying KW Cares of your future gift, you are helping to inspire others to encourage others to do the same. We may contact you to share your story unless you would like to remain anonymous.

Please email or mail this form to:

KW Cares  
Attn: Rachel Elder  
2011 South Mopac Expressway, Suite 400  
Austin, Texas 78746  
Email: rachel.elder@kw.com