



Chairman of the Board of Trustees: **The Honorable Robert M. Gates**

Vice-Chair of the Board of Trustees: **The Honorable Christine Todd Whitman**

Chair, Executive Committee: **Matthew G. Manders**

President: **George de Lama**

## Confidential Gift Intention Form

We realize that many donors who plan to support Eisenhower Fellowships through their estate and/or financial plans prefer to keep their intentions private. However, by informing us of your plans, we can thank you during your life and confirm that we can fulfill your stated intentions.

Please know that completing this form is non-binding — we understand that you may change your plans anytime. Please also know that all the information you share with us is kept strictly confidential.

### ***Planned Gift Notification - Confidential***

#### ***Personal Information***

Name: \_\_\_\_\_ Spouse Name: \_\_\_\_\_

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

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

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

#### ***Your Gift Intention***

Please provide the following information and attach a copy of the documentation or appropriate language from your will or trust, if available. Please complete all that apply.

- ☐ I/We want to support the mission of Eisenhower Fellowships through a planned gift as described below:
- ☐ I/We have included a bequest for Eisenhower Fellowships in my/our will or living trust.
- ☐ I/We have named Eisenhower Fellowships as a beneficiary of an asset:
  - ☐ Retirement Plan
  - ☐ Bank, Investment, or Other Financial Account
  - ☐ Other
- ☐ I/We have named Eisenhower Fellowships as a revocable/irrevocable (circle one) beneficiary of a charitable remainder trust.

The anticipated value of my/our gift is/will be approximately \$\_\_\_\_\_ or \_\_\_\_\_% of my/our estate. (Please include a copy of the bequest language or other wording describing your planned gift if possible.)

Please provide a general description of the gift provision.

- ☐ Yes, you may include me/us in listings of planned gift donors.
- ☐ No, please do not include me/us in listings

Please indicate how you would like your name(s) to appear in our digital and print materials. (Please note the amount of your intended gift will not be published).

Signature(s): \_\_\_\_\_ Date: \_\_\_\_\_

**Leaders bettering the world around them.**

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