



Letter of Intent for Estate Gift

I/we desire to provide for the future well-being of Stonehill Communities/The Stonehill Benevolent Foundation through a provision in my/our estate plans. I/we understand that this letter of intent is not binding and these plans can be revoked or modified by me/us at any time.

Name(s)

Address, City, State, Zip

Phone

Email

I/we have made a provision to leave a legacy/planned gift to the Stonehill Benevolent Foundation through my/our:

☐ Will ☐ Retirement Plan or IRA ☐ Living Trust ☐ Life Insurance Policy

☐ Other _____

The current/approximate value* of my/our future gift is: \$ _____.

**This amount will be kept confidential and is for long-term planning purposes only.*

To arrange a bequest from your will or trust(s), work with your estate-planning attorney to create or amend necessary legal documents. Documents may include:

"I give, devise and bequeath to Stonehill Franciscan Services via the Stonehill Benevolent Foundation located at 3485 Windsor Ave. Dubuque, IA, who has a tax identification number of **42-1337556**, the sum of \$_____ or _____% of my residue of my estate."

☐ You may publish my/our names (without any dollar amount) in Stonehill's Legacy Society listing to inspire others to make similar gifts.

☐ I/we do not want my/our names published.

Change Your Mind at Any Time

We realize that circumstances change, and the bequest to us in your will or trust may no longer be possible at some future date. Your family and friends come first. You can change your mind at any time with or without notifying Stonehill.

Date

Signature

Signature (if applicable)

For questions about planned gifts or other donations please contact Tracy Connolly, Director of Community Relations and Mission Advancement at 563.690.9660 or tconnolly@stonehilldbq.com.