



Letter of Intent for Estate Gift

You want to support southwest Minnesota. We want to ensure we understand your specific wishes and can fulfill them.

Please complete this non-binding letter of intent. All information provided will be treated strictly confidentially, will be used for internal purposes only, and is not considered to be a legal or financial obligation.

This statement is an expression of my/our intent to provide for the future of Southwest Initiative Foundation, a community foundation partner or another fund through a planned or estate gift. I/we conservatively estimate the current value of my/our estate plan provision to be approximately \$_____. Southwest Initiative Foundation recognizes that values are subject to change and dependent upon unforeseen circumstances. Further, I/we understand that any bequest may be changed without further notice.

Gift Type (check all that apply):

I/We have included or plan to include Southwest Initiative Foundation as a charitable beneficiary of a will or trust

I/We have named or plan to name Southwest Initiative Foundation as a beneficiary of a charitable trust or annuity, with income reserved for myself/ourselves or other income beneficiary

I/We have named or plan to name Southwest Initiative Foundation as a beneficiary of a retirement plan

I/We have named or plan to name Southwest Initiative Foundation as a beneficiary of a life insurance policy

I/We plan to include Southwest Initiative Foundation in another manner (please explain below):



**SOUTHWEST INITIATIVE
FOUNDATION**

15 3rd Avenue NW | Hutchinson, MN 55350 | 800-594-9480 or 320-587-4848 | www.swifoundation.org



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Standards for U.S. Community Foundations
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Gift Purpose (check all that apply):

Unrestricted, entrusting decisions to Southwest Initiative Foundation's Board of Directors to seize opportunities and meet the most pressing regional needs

Southwest Initiative Foundation's unrestricted endowment (permanent) fund

Community foundation partner endowment (permanent) fund

Which community? _____

Other (please explain below):

Gift recognition:

You may recognize my/our gift after you receive it. At that time, please recognize my name/our names as _____.

You may not recognize my/our gift after you receive it. Please keep the gift anonymous.

If your gift is designated for a community foundation partner or other fund, may we inform the local leadership of your intent? Yes No

Contact Information:

Signature _____ Date _____ Signature _____ Date _____

Printed Name _____ Printed Name _____

Date of Birth _____ Date of Birth _____

Email address _____ Email address _____

Mailing Address _____

City _____ State _____ Zip _____

Telephone number(s) _____

CONTACT US

This completed document should be mailed to Southwest Initiative Foundation, Attn: Giving Team, 15 3rd Ave NW, Hutchinson, MN 55350. If you have questions, please call us at (800) 594-9480 or email donate@swifoundation.org.