



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

swifoundation.org

CFNS

**ACCREDITED
FOUNDATION**

Confirmed in Compliance with National
Standards for U.S. Community Foundations
An Equal Opportunity Provider and Employer

Gift Purpose (check all that apply):

- Unrestricted, entrusting decisions to Southwest Initiative Foundation's Board of Directors to respond to 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/our name(s) 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) _____			

This completed document should be mailed to:

Southwest Initiative Foundation
 Attn: Development Team
 15 3rd Ave NW
 Hutchinson, MN 55350

If you have questions, please call us at (800) 594-9480 or email donate@swifoundation.org

Southwest Initiative Foundation is a 501(c)(3) public charity, Tax ID 41-1555592.