



The Dressage Foundation's Legacy Society Confidential Letter of Intent

All information provided below will be treated strictly confidential and will be used for The Dressage Foundation's internal purposes only. This document and its contents are not considered to be a legal or financial obligation.

Date: _____

Name(s): _____

Address: _____

Phone: _____

Email: _____

This confidential letter of intent confirms that a provision for The Dressage Foundation has been made through the following:

- Bequest in Will or Revocable Living Trust
- Beneficiary designation in qualified retirement plan
- Beneficiary designation in life insurance policy
- Establishment of a Charitable Remainder Unitrust or Charitable Lead Trust
- Establishment of a Charitable Gift Annuity
- Other: _____

Please tell us about your gift designation:

- The Dressage Foundation may use this gift where needed most
- I have planned this gift in honor of someone: _____
- I would like this gift to provide for a specific purpose: _____

Estimated amount of designation (this is not required, but helps us to document your gift):

(over)

Please also share with us what influenced your decision to leave an estate gift to The Dressage Foundation:

The Dressage Foundation's Legacy Society honors and thanks supporters who include the Foundation in their will or estate plan, or who establish a gift with The Dressage Foundation that provides income for life.

- My/our name(s) may be published as a member(s) of The Dressage Foundation's Legacy Society**
- I/We prefer to remain anonymous**

My/Our Signature(s):

Additional Information

I/We worked with the following financial advisor to establish this gift:

Name, Business: _____

Contact Information: _____
