



Letter of Intent for a Legacy Gift

I/We hereby inform you that a legacy gift to CaringMatters is included in my/our estate plans. I/We understand that the commitment is non-binding and I/we retain the right to change or revoke the gift anytime.

Name _____ DOB: ____/____/____

Name _____ DOB: ____/____/____

Address (please include zip code) _____

Phone (____) _____ Fax (____) _____ Email _____

I/We have provided this gift through my/our:

- Will IRA/Retirement Plan Charitable Remainder Trust
- Trust Life Insurance Other _____

Use of funds: Restricted for: _____ Unrestricted

I/We wish to inform CaringMatters for long-term planning purposes, that as of this date, the value of my/our gift is: \$_____*. [Note: If your gift is a percentage of your estate, please indicate the approximate present value of that percentage. This information will remain confidential.] I/We understand that, by stating an amount, my/ our estate is not legally bound by this statement and I/we can alter or revoke this gift at any time.

*We understand that the value of your gift may change depending on circumstances.

Donor Signature Date

Donor Signature Date

Please do not publish our name(s). We prefer to keep this commitment private

Return to:
CaringMatters
Attention: Amy Bayersdorfer
518 South Frederick Avenue
Gaithersburg, MD 20877