



# CONFIDENTIAL LEGACY INTENTION FORM

In acknowledgment of my strong belief and commitment to the mission and impact of Community Legal Aid, I am declaring my intent to include Community Legal Aid in my estate plans. It is my desire to ensure that Community Legal Aid continues to fulfill its mission for generations to come. I am honored to become a member of *Legacy of Justice Society*, alongside other individuals who have also contributed in this way.

\_\_\_\_\_  
LAST NAME FIRST NAME MIDDLE

\_\_\_\_\_  
BIRTH DATE

\_\_\_\_\_  
STREET ADDRESS CITY STATE ZIP

\_\_\_\_\_  
E-MAIL HOME PHONE CELL PHONE

I have made / intend to make provisions for Community Legal Aid through:

- A bequest in my will
- A retirement plan
- A charitable trust
- Succession plan for my donor advised funds
- A charitable gift annuity
- A gift of real estate, securities or other property
- A life insurance policy
- Other \_\_\_\_\_
- Please call me to discuss the items I have checked above
- I have enclosed a copy of my planned giving instrument (e.g. will, trust, etc.) (OPTIONAL)

The approximate value of my gift is \$ \_\_\_\_\_ (OPTIONAL)

Please send a copy of this letter to my attorney/advisor: (OPTIONAL)

\_\_\_\_\_  
NAME OF ATTORNEY

\_\_\_\_\_  
STREET CITY STATE ZIP

In Community Legal Aid reports and publications:

- Please acknowledge me as \_\_\_\_\_.
- I would like to remain anonymous. NAME, AS YOU WOULD LIKE IT TO APPEAR

\_\_\_\_\_  
SIGNATURE DATE

We encourage you to seek the advice of professional counsel when considering your estate planning.