



San Antonio Area Foundation
Where Giving and Community Connect

CONFIDENTIAL LETTER OF INTENT

All information provided below will be treated strictly confidentially, will be used for the San Antonio Area Foundation's internal purposes only, and is not considered to be a legal or financial obligation.

The San Antonio Area Foundation recognizes all those making long-term provisions for it or any of its programs as members of its *Visionary Circle*.

We would be humbled and honored to play a part in maintaining your legacy, and we want to ensure that we recognize you in the way that you desire and collect relevant information that you would like to share with us regarding your plans so that we are best able to fulfill your philanthropic goals.

Thank you so much for your steadfast generosity and for the impact that it will have on the organizations and causes that you care about the most.

Kind regards,

Lisa Brunsvold
Vice President for Development

Would you like to remain anonymous?

- My/our name/s may be published as a member(s) of the *Visionary Circle*
- I/we prefer to remain anonymous

Signature: _____ Date: _____

Signature: _____

Print Name/s: _____

Address: _____

City: _____ State: _____ Zip: _____

Telephone: _____ Email: _____

Birthday/s: _____



Confirmed in Compliance with National Standards for U.S. Community Foundations



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Completing this section is optional:

As an indication of my/our support for the San Antonio Area Foundation or one of its programs, I/we am pleased to confirm that I/we have made a provision for the

_____ Fund of the San Antonio Area Foundation

as follows (select all that apply):

- Bequest in my/our Will
- Provision in my/our Revocable Living Trust
- Establishment of a Charitable Remainder Trust
- Establishment of a Charitable Gift Annuity
- Beneficiary Designation in my/our Qualified Retirement Plan or Commercial Annuity
- Life Insurance Gift
- Endowment Fund
- Other

Description of the provision/s and what I would like my support to accomplish:

I/we conservatively estimate the current value of my/our provision to be approximately \$_____. The San Antonio Area Foundation recognizes that values are subject to change and dependent upon unforeseen circumstances. This information will be used only to help the San Antonio Area Foundation project possible future financial support and *is not considered a legally binding obligation.*

I/we worked with the following advisor to establish the gift:

Name: _____ Profession: _____

Company/Address: _____

City: _____ State: _____ Zip: _____

Thank you for your generous support!

Please return the completed form in the enclosed return envelope to the San Antonio Area Foundation or by email:

Givenow@saafdn.org

Lbrunsvold@saafdn.org



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