



LETTER OF INTENT TO LEAVE A LEGACY

Inspired by the women-led initiatives that provide for women and girls in Western Massachusetts, and in partnership with the Women's Fund of Western Massachusetts, I/we take deep satisfaction in declaring my/our intent to help the Women's Fund provide for the needs of future generations of women and girls in Western Massachusetts.

I/We have already made will make a provision to include the Women's Fund of Western Massachusetts as a beneficiary.

Name of Donor (s) _____

Address _____

Preferred Phone _____ Email _____

Donor Recognition:

- Yes, to inspire others, please include my name under *Joan's Circle of Friends* on the WFWM website. I understand no value will be listed for my planned gift pledge.
- I prefer my planned gift to be anonymous.

Signature _____ Date _____

Print your name(s) exactly as you wish it to be listed in publications or on permanent donor lists.

The following information is optional for you to disclose, but would be helpful to us for planning purposes.

My legacy gift will be in the form of:

- A bequest in my/our will
- A deferred lifetime gift
- A beneficiary designation from an IRA or other tax qualified retirement plan such as a 401(k), profit sharing, 403(b), or pension plan
- As a beneficiary under a life insurance policy
- Through a trust fund and/or foundation
- Other _____

The approximate value of my legacy gift will be _____ % of my estate or:

- Over \$500,000
 - \$250,000 to \$499,000
 - \$100,000 to \$249,000
 - \$50,000 to \$99,000
 - \$25,000 to \$98,000
 - Under \$25,000
- I have attached a copy of the page or paragraph mentioning my intentions for the Women's Fund.
 - I pledge to notify the Women's Fund should I alter my provision for the Fund.

Thank you for ensuring the future of the programs and services of the Women's Fund of Western Massachusetts. You are changing families, communities, and the world!