



**Statement of Intent to include
The Community Foundation for Southwest Washington
in my/our estate plans**

This is not a legal document, but merely a Statement of Intent. For any gifts more complex than a simple bequest we recommend you work with a professional advisor and/or the Community Foundation to determine the best financial strategy for you.

My / Our information

Name(s):

Address:

City, State, ZIP:

Phone Number:

Email Address:

My / Our provision for a gift

- I / We have made the following provision for a gift:
- Bequest or Revocable Living Trust
 - Other Planned Gift
- I / We intend to make a provision in my/our will or revocable living trust for a gift.

Purpose of my / our gift

- I/We wish to add a bequest gift to our existing Community Foundation fund.
- I /We wish to establish a Donor Advised Fund and name the following individual(s) as fund advisors _____, with _____ serving as the fund chair.

- I/We wish to establish a fund to support the following Section 501(c)(3) public charity(s)_____.
- I/We wish to establish a fund to support the following field of interest _____.
- I/We wish to establish a Scholarship Fund to support scholarships at the following school, for a special area of study, or in recognition of academic achievement or other qualities_____.
- I / We wish to support the Community Giving Fund.
- I / We wish to support the Community Foundation’s Administrative Endowment.

Recognition of my / our gift

- I / We authorize The Community Foundation for Southwest Washington to include my/our name(s) in publications such as the Annual Report.

Please list my/our name(s) as follows:

Contact me

- I / We would like to learn more about making a bequest or other planned gift to The Community Foundation for Southwest Washington.
 - Please call
 - Please send me information