



Letter of Intent for a Planned Gift

Naming Klein UMC Foundation as Beneficiary

Please submit this form to the Klein UMC Foundation, c/o Klein UMC, 5920 FM 2920, Spring, TX 77388, Attn: Carol Davis
Questions: Contact Dana Croswhite at kfdcroswhite@gmail.com

New Intention Updated Intention

| |
|---|
| <i>Click or tap here to enter Name(s)</i> |
| <i>Click or tap here to enter Address</i> |
| <i>Click or tap here to enter Phone</i> |
| <i>Click or tap here to enter Email</i> |

Preferences

It is my/our intention to leave a planned gift to the Klein UMC Foundation through my/our:

- | | |
|--|--|
| <input type="checkbox"/> Will or Trust | <input type="checkbox"/> Charitable Remainder Trust |
| <input type="checkbox"/> Charitable Lead Trust | <input type="checkbox"/> Donor Advised Fund |
| <input type="checkbox"/> Life Insurance Policy | <input type="checkbox"/> Other Assets (please describe): |
| <input type="checkbox"/> Retirement Plan/Beneficiary Designation (401(k), 403(b), IRA, Keough, Brokerage Account) | <i>Click or tap here to enter "Other Assets" Info</i> |

I/We would like to inform the Klein UMC Foundation, for long term planning purposes only, that as of this date, the estimated value of my/our gift is as follows:

\$ Amount: \$ *Enter Amount* OR % of my/our estate: *Enter %*

I/We understand that my/our estate is not legally bound by this statement and at any time I/we may choose to add, subtract, or revoke the Klein UMC Foundation as beneficiary of this planned gift.*

Recognition

Donors who include the Klein UMC Foundation in their estate plans with a minimum \$1,000 donation will be inducted into the 77 Society of the Klein UMC Foundation. If Letter of Intent is completed by August 31, 2024, donors will be recognized as *Founding Members of the 77 Society*.

Please list my/our names as follows: OR I/We wish remain anonymous.

| |
|---|
| <i>Click or tap here to enter Name(s)</i> |
|---|

Signature

Date

Signature

Date

*The Klein UMC Foundation greatly appreciates notification in the event that you make a change or adjustment to this gift.