

STATEMENT OF INTENT



**Marshfield Area
United Way**

Leaving a legacy with Marshfield Area United Way will provide funding now and into the future to serve the most current, critical needs of our community's most vulnerable populations with programs that provide measurable results.

This statement of intent is an expression of your present plans to include Marshfield Area United Way in your estate plan.

- I/We have made a provision for Marshfield Area United Way in my/our will (or other financial estate planning document).
- I/We will include Marshfield Area United Way in my/our will or other financial estate planning document and will notify you when my/our plans are completed.

1. CONTACT INFORMATION (NAME AS YOU WOULD LIKE IT TO APPEAR IN RECOGNITION)

Name: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Phone: _____ Email: _____

2. METHOD

I/WE plan to make a provision for Marshfield Area United Way as a gift:

(Check all that apply)

- | | |
|---|--|
| <input type="checkbox"/> Outright Cash Gift | <input type="checkbox"/> Beneficiary Designation
<i>(i.e. IRA, 401K, Donor Advised Fund)</i> |
| <input type="checkbox"/> Bequest in Will/Trust | <input type="checkbox"/> Life Income Gift
<i>(i.e. Charitable Remainder Trust or Annuity)</i> |
| <input type="checkbox"/> Life Insurance Policy | |
| <input type="checkbox"/> Other, please specify: _____ | |

3. ESTIMATED GIFT AMOUNT (OPTIONAL)

**Please note that including a gift amount is optional; however, it will help United Way to better plan for the future.*

\$ _____ Other: _____

4. RECOGNITION

- I/We hope to inspire others to consider a planned gift to Marshfield Area United Way. Please acknowledge my/our Letter of Intent with other generous donors in recognition materials.
- I/We prefer to remain anonymous.

Signature

Date

Although this statement of intent is not a legal obligation and may be changed by either party at any time, it has been made in good faith as a commitment to Marshfield Area United Way.

**Note: Marshfield Area United Way, Inc is a 501(c)(3) organization with Federal ID# 39-1035073
Be sure to include "Marshfield Area United Way, Inc." with any designations.**

Marshfield Area United Way's Endowment Fund is housed at Marshfield Area Community Foundation.

FOR MORE INFORMATION CONTACT:
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