Big Brothers Big Sisters
PUGET SOUND

PLANNED GIFT LETTER OF INTENT

Thank you for helping ensure that future generations of young people have caring mentors in their corner.

MY INTENTION

I/we have included, or intend to include, Big Brothers Big Sisters of Puget Sound (BBBSPS) in my/our estate or financial plans. This form is intended to help BBBSPS understand and acknowledge my/our charitable intentions.

- ☐ Gift through a will or trust
- ☐ IRA or other retirement account beneficiary designation
- ☐ 401(k) or other employer retirement plan beneficiary designation
- ☐ Life insurance beneficiary designation
- ☐ Other: _____

GIFT INFORMATION (OPTIONAL)

Approximate current value of planned gift: $ _____

OR approximate percentage of estate/account/policy: _____ %

☐ I prefer not to provide an estimated value at this time.

Gift purpose: ☐ Where most needed ☐ Other: _____

RECOGNITION PREFERENCES

☐ BBBSPS may recognize my/our planned gift publicly.

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

☐ I/we prefer to remain anonymous.

CONTACT INFORMATION

Name(s): _____

Address: _____

City/State/ZIP: _____

Email: _____ Phone: _____

ACKNOWLEDGMENT

I/we understand that this Letter of Intent is a statement of my/our current charitable intentions only. It is not a legally binding pledge or obligation and does not replace a will, trust, beneficiary designation, or other legal document. I/we may change or revoke these plans at any time. I/we understand that BBBSPS encourages donors to consult with their own legal, tax, or financial advisors regarding planned gifts.

Signature: _____ Date: _____

Signature (if applicable): _____ Date: _____

PLEASE RETURN THIS FORM TO:

James Modie, Chief Development Officer
Big Brothers Big Sisters of Puget Sound
james.modie@bbbsps.org

Mailing Address
12600 SE 38th St., Ste. 150
Bellevue, WA 98006
Phone: 206.249.4300

Thank you for sharing your intentions with us. The information you provide will be treated with care and used to help BBBSPS acknowledge and steward your future commitment.