



ESTATE INTENTION

It is my (our) pleasure to inform you that I (we) have named Texas Methodist Foundation in Austin, Texas ("TMF") as a beneficiary of an estate gift. This letter signifies my (our) intention to make a bequest through my (our) estate plan of approximately \$_____ for the further benefit of _____.

(You can designate any specific purpose(s) to which you want TMF to apply your gift in the line above. For example, you could designate a gift to fund "such purpose as TMF's Board determines is the purpose of greatest need at the time of transfer", or for "TMF's general purposes", for the "TMF Undesignated Endowment", "Leadership Ministry Endowment" or "Dr. Laing Endowment". In determining which purpose(s) to apply your gift, TMF will look first to directions in your estate or legal documents; then to this form; and, finally, in the absence of specific directions, to TMF's purpose of greatest need.)

This gift is presently structured to take the form of: _____.

(Please specify: Beneficiary of a Will or Living Trust; Beneficiary by Way of a Designation Form for a Life Insurance Policy, Bank or Savings Account, Investment Account such as an IRA, 401(k) or 403(b) or Other Retirement Plan; as the Remainder Beneficiary of a Charitable Remainder Unitrust (CRUT) or Charitable Remainder Annuity Trust; or Other (please specify)).

I (We) will, to the extent practical, attempt to keep TMF informed should I (we) change my (our) gift intention as reflected in this statement or should the dollar value of my (our) estate's potential donation significantly increase or decrease.

Investing in the future of Texas Methodist Foundation gives me (us) great satisfaction in knowing that my (our) gift will help future ministries of the Texas Methodist Foundation.

Signature

Date

Signature

Date

Name(s) (Please Print): _____

Address: _____

City, State, Zip: _____

Phone: _____ Email: _____

Thank you for sharing this information to ensure that when the time comes, Texas Methodist Foundation understands and can abide by your bequest intentions. Your plans will remain confidential.

Please include me (us) as members of the **Gloria J. Moores Society**. I (We) approve the listing of our names in Foundation publications as members of **the Gloria J. Moores Society** and request that you list my (our) name(s) as: _____.

I (We) prefer to be listed as "Anonymous" members of the **Gloria J. Moores Society**.

I (We) do not wish to be listed as members of the **Gloria J. Moores Society**. Please do not include my (our) name(s) on the roster of members of the **Gloria J. Moores Society**.

*As with any decision involving your assets, we urge you to seek the advice of your professional counsel when considering a gift to Texas Methodist Foundation.