



Confidential Letter of Intent

All information provided below will be treated strictly confidential, will be used by We Raise Foundation's internal purposes only, and is not considered to be a legal or financial obligation.

Name(s): _____

Address: _____

City: _____ State: _____ Zip Code: _____

Date(s) of Birth: _____ Phone: _____

Email: _____

Part I — The Terms of Your Charitable Bequest/Expectancy

A. Type of Bequest:

I/We have supported We Raise Foundation through my/our:

- Will IRA Retirement Plan Trust Insurance Policy Other

B. My/Our charitable bequest is in the following form and amount:

Percentage of Estate Percentage _____ %

Cash Amount \$ _____
Includes stocks, bonds and other liquid assets

Specific Property/Current Value _____
A specific bequest is one in which you designate specific assets

Residuary Estimated Amount \$ _____
We Raise Foundation is bequeathed the remainder of your estate after other bequests, debts, taxes and expenses have been paid.

- Contingent
A bequest to We Raise Foundation takes place only if the beneficiaries named in your will predecease you.

Terms _____

We Raise Foundation suggests the following language be used in making your bequest: “We Raise Foundation is an Illinois not-for-profit corporation with its primary address at One Pierce Place, Suite 250E, Itasca, IL 60143. Its FEIN number is 84-0404924.”

The exact amount will not be known until the estate is finally settled. However, I/we believe a conservative estimate of \$ _____ can be added to expectancy goals to support and develop sustainable programs that help people thrive.

- I/We reserve the right to alter this intention if future circumstances so warrant.

C. Relevant Documents

I am willing to have We Raise Foundation follow up to insure that my charitable interests are fulfilled after my death, and have enclosed a copy of the section(s) of my will or beneficiary designations regarding my gift to We Raise Foundation.

- Document(s) enclosed
- Document(s) not enclosed

Part II — Gift Instructions and Recognition

- Use my gift where needed most
- Establish a named endowment to provide grants in the area of _____ (minimum of \$25,000)
- Add my gift to the We Raise Foundation endowment to support and develop sustainable programs that help people thrive.
- Add my gift to the Walther League Endowment for youth and young adult programs.

_____ I would like my bequest to be recognized in We Raise Foundation’s Circle of Hope.

_____ I wish that my bequest to We Raise Foundation remain anonymous.

Signature: _____ Date: _____

Signature: _____ Date: _____

Please return this completed document Attention:
Heather Klein Olson, Vice President of Advancement, We Raise Foundation, One Pierce Place, Suite 250E, Itasca, IL 60143. We encourage you to retain a copy of this document with your records.