

# BALTIMORE HERITAGE

WORKING TOGETHER TO PRESERVE AND PLAN BALTIMORE'S FUTURE

11 1/2 WEST CHASE STREET, BALTIMORE, MD 21201 • 410.332.9992 • www.baltimoreheritage.org

## ESTATE INTENTION FORM

*This is a confidential record. In order that Baltimore Heritage may include you in our planned giving society, value your future gift for any campaign purposes, and properly thank you and acknowledge your gift, please fill out the following information which applies to your future gift. Thank you!*

My Will/Trust was signed on: \_\_\_\_\_.

### **Public Acknowledgement**

\_\_\_ I look forward to talking with you about this gift intention. I understand that listing this gift may be an incentive for others to give and I am willing to be publicly acknowledged.

\_\_\_ I understand you would like to contact me and I would be happy to discuss this with you but I prefer not to be listed or acknowledged publicly.

### **Gift Value [Optional]**

My Will/Trust provides that \_\_\_\_\_% shall be bequeathed to Baltimore Heritage through my estate. As of today's date, I estimate that the value of this provision in my estate plan would be approximately \$ \_\_\_\_\_.

My Will/Trust provides that \$ \_\_\_\_\_ shall be bequeathed to Baltimore Heritage through my estate.

### **Gift Purpose**

My Will/Trust indicates that the bequest through my estate is for:

\_\_\_\_\_ general use or purposes **OR** \_\_\_\_\_ the Baltimore Heritage Endowment Fund.

I understand that I am not making a legal, or binding, commitment upon my estate by submitting this Estate Intention Form. Further, Baltimore Heritage should understand that the size of my future gift might be significantly different from the amount estimated above for the purposes of valuation in any campaign. If for any reason in the future Baltimore Heritage is no longer included in my estate plan, I will notify you so that you can update your records and remove me from the planned giving society.

**Name:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Telephone:** \_\_\_\_\_ **Email:** \_\_\_\_\_

### **Please return this form to:**

Mr. Johns Hopkins, Baltimore Heritage, 11 1/2 West Chase Street, Baltimore, Maryland 21201