



Letter of Intent for a Planned Gift

New Intention

Updated Intention

NAME(S)

ADDRESS

CITY

STATE

ZIP

PHONE

E-MAIL

PREFERENCES

I/We wish to provide a planned gift of support and have made a provision for a gift to Beacon Academy in my/our estate plans. It is my/our intention to leave a planned gift to Beacon Academy through my/our:

Will or Trust Charitable Lead

Charitable Remainder Trust

Trust Life Insurance Policy

Donor Advised Fund Remainder

Retirement Plan/Beneficiary Designation

Other Asset(s) (please describe)

(401(k) 403(b), IRA, Keogh, Brokerage Account)

I/We would like to inform Beacon Academy, for long-term planning purposes only, that, as of this date, the estimated value of my/our gift is \$_____ or _____% of my/our estate. I/We understand that my/our estate is not legally bound by this statement, and at any time, I/we may choose to add, subtract, or revoke Beacon Academy as the beneficiary of this planned gift.*

GIFT PURPOSE:

Unrestricted

Unrestricted Endowment

An unrestricted gift allows your donation to go where it is needed most.

Other (Please indicate below – briefly describe the program or fund you would like your gift to benefit. If multiple areas, please provide percentages or specific amounts).

RECOGNITION

Donors who include Beacon in their estate plans will be enrolled in Beacon Academy's Legacy Society.

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

I/We prefer no public recognition

SIGNATURE

DATE

SIGNATURE

DATE

**Beacon Academy greatly appreciates notification in the event that you make a change or adjustment to this gift.*



YOUR WORDS MATTER

There are other passionate educational equity advocates like you; would you help us inspire them?

When you share your reasons for giving, your words may help someone envision the joy of planned giving and decide to make a transformational gift of their own.

I made a transformational gift to Beacon Academy because:

I hope my gift:

Thank you!

Thank you so much for your generous planned giving donation. Your support plays a vital role in helping us achieve our educational equity goals and make a meaningful impact in the lives of determined and inquisitive students from historically under-resourced and/or underrepresented communities. We are truly grateful for your commitment and support in our mission.