## Letter of Intention from the Donor

**Month, Day, Year**

**Favorite Charity**

**123 Main Street**

**Any Town, USA 00000]**

**If sent via US Postal Service: If sent by Overnight Delivery:**

**Charity Charity**

**123 Main Street Attention:**

**Town, USA 0000 123 Main Street**

**Town, USA 0000**

Dear \_\_\_\_\_\_:

I am pleased to inform you that I have included your charity as a beneficiary of my retirement plan. [My gift is unrestricted, to be used by the charity at its discretion for the greatest need] ***OR*** [My gift is to be applied for the benefit of the **{Specific *Program}***].

I have made a provision to distribute a sum in the amount of $\_\_\_\_\_\_\_\_\_ from my retirement plan ***OR (Preferred)*** \*a percentage of my retirement plan in the amount of %\_\_\_.

Please let me know of any questions.

Sincerely,

Donor Name

Address

Telephone

Email

***\*When you make a percentage distribution of your retirement plan assets, that ensures all of your beneficiaries — loved ones and charity — get something, no matter what the plan’s balance is. When you include a specific sum, you put your loved ones and charity at risk of receiving less than you intended, or even nothing, if the balance in your plan at death is less than your specific sum distributions.***