



## Heritage Society – Notice of Intent

The Rochester Area Foundation Heritage Society seeks to recognize all those who have included the Rochester Area Foundation in their will or other instrument in their estate plans.

To serve as notice and advice to my estate planning advisor and the executor of my estate, this non-binding Letter of Intent represents my/our preference that the gift described below will be made to the Rochester Area Foundation

on my/our behalf.

It is my/our intention to update our estate plan at the next available opportunity, with the following provisions:

Provide a gift:

- \_\_\_\_\_ Per cent of the estate.
- A specific dollar amount to be specified in the estate plan.
- An amount to be specified by my heirs
- From a life insurance policy
- From my trust
- From my IRA or other retirement account.
- Of real estate
- Other \_\_\_\_\_

The use of this gift is:

- Unrestricted
- Restricted - To be used for \_\_\_\_\_

Optional: the anticipated amount of my legacy will be \$ \_\_\_\_\_

We encourage you to discuss these options with your family and with your attorney, accountant, insurance agent or financial planner as may be appropriate. You may also contact the Rochester Area Foundation office to discuss the various ways to leave your legacy through the Foundation.

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I/We hereby confirm the intent to make a gift to the Rochester Area Foundation (RAF) from my/our estate in accordance with the provisions stated above. In addition to those provisions, I/we wish to be included in the Heritage Society and agree to be included in published listings of the Society's members.

Dated this \_\_\_\_ day of \_\_\_\_\_

Please print name(s) as you wish to be listed.

Name(s): \_\_\_\_\_

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Signature(s) \_\_\_\_\_

### Rochester Area Foundation

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