



Confidential Bequest Intention Form

GIFT INFORMATION, INTENTION, AND ACKNOWLEDGEMENTS

Thank you for including TDF as a part of your legacy! This information will be held in confidence. TDF acknowledges that this is a non-binding indication of your intent to include TDF in your estate plans. It does not constitute a pledge and can be altered, in whole or in part, should your circumstances change.

This letter of intent expresses my/our desire to sustain the work of TDF for future generations. I/We have provided the following planned gift commitment through my/our (please check those that apply):

Will/Living Trust

Retirement Plan

Life Insurance Policy

Stocks

Other

Please designate my gift to the following TDF program or initiative*

To encourage others to participate in planned giving, I/we give TDF permission to list me/us as a member of the TDF Legacy Circle. Please acknowledge me/us as:

I/We prefer to remain anonymous.

If you are comfortable doing so, please help TDF better understand your future support by sharing the following:

The approximate value of my gift is: _____, or

My bequest is stated as a percentage and is worth approximately:
(TDF would welcome, but does not require, your best good-faith estimate of the value of your bequest based on the approximate current value of your assets).

Signature:

Date:

In order to assure TDF's continued ability to honor the wishes of our donors, please consider providing a copy of the appropriate section of your Will, Trust or Beneficiary Designation reflecting your commitment.

DONOR INFORMATION

Name(s) (Please Print):

Address:

City:

State:

Zip:

Email:

Phone:

THANK YOU!

TDF is a nonprofit exempt from federal and state income taxes. Our federal tax ID # is 13-6216919. Please keep a copy of this document for your files. This document is not legally binding.

Please complete this form and return

By mail: TDF 520 8th Avenue, Suite 801 New York, NY, 10018

By email: Please scan signed PDF and send to Whitney Estrin at whitneye@tdf.org

Questions?

Contact Whitney Estrin: [212.912.9770](tel:212.912.9770) ext. *345 | whitneye@tdf.org

**If circumstances at TDF should change rendering the purpose of this gift impracticable or impossible, the gift will be used for purposes in keeping with the purpose described herein as recommended by TDF's executive leadership.*