Planned Gift Letter of Intent

Name of Donor(s)

Mailing Address

Email

Telephone

Birthdate(s)

I (we) have included Albuquerque Oasis as a beneficiary in one or more of the following:

☐ Will or Living Trust ☐ Retirement Plan Assets ☐ Annuity ☐ Life Insurance Policy

☐ Charitable Gift Annuity ☐ Other (please describe) _____

Current estimated value of my legacy gift (optional)

☐ Attached is a copy of the relevant portions of the legal documents relating to my/our future gift to Oasis or a letter from my legal or financial advisor that describes the nature and purpose of the gift. (Optional)

Purpose (please indicate the way you wish your gift to be used)
Oasis's policy is to direct bequests and estate gifts to be used toward the organization's greatest needs. If you would like your planned gift to support a specific purpose, please note that below so we can work with you to ensure that your wishes can be honored.

☐ Unrestricted, for the greatest needs of Albuquerque Oasis, *OR*

☐ For the specific purpose of: _____

Recognition

☐ I would like my (our) gift to be anonymous, *OR*

☐ I would like to have my name (our name) listed as: _____

☐ Please contact me to learn why I/we have chosen to make a legacy gift to Albuquerque Oasis.

Signature

Signature

Date

Date

Please return this form to:
Albuquerque Oasis
Attn: Scott Sharp
PO Box 35518
Albuquerque, NM 87176

You may also email to ssharp@oasisnet.org.

This is not a legally binding contract, but merely an expression of the donor's current intent. Donors are encouraged to seek legal and financial planning advice prior to making charitable gifts. Oasis does not provide legal, financial or tax advice.