
Letter of Intent for Estate Gift

I/we desire to support the future of Optica Foundation through a provision in my/our estate plans. I/we understand that this future commitment can be revoked or modified by me/us at any time.

Name/s *(Please include your spouse's name if this is a joint gift)*

Address

City

State

Zip Code

Phone

Email

I/we have made the following provisions to leave a legacy to Optica Foundation (please check all that apply):

- ☐ I/we have included Optica Foundation in my/our Will or Revocable Trust.
- ☐ I/we have made other estate provisions naming Optica Foundation as beneficiary (life insurance policy, retirement plan or IRA, other).

Briefly describe your planned gift for the benefit of Optica Foundation:

Please attach a copy of the relevant portion of the legal documents in which your gift is described or a letter from your financial or legal adviser describing your future gift.

The current estimated value of my/our future gift is:

\$ _____

(If your gift is a percentage of your estate, please indicate the approximate value.)

Please indicate the area of the foundation you wish to support with your gift, such as unrestricted (general purposes) or a specific fund:

All bequests must be approved by the Optica Foundation Board of Directors prior to acceptance.

- ☐ You may publish my/our names, as listed above, as part of donor recognition and other organization communication.
- ☐ I/we prefer not to be listed and to remain anonymous in public recognition.

Date: _____

Signature: _____

Spouse's signature, if applicable: _____