

Anonymous Confidential Planned Gift Confirmation from Financial Planner

To: Name of staff contact

From: Name of financial planner _____

This is to inform you that on or about _____ date _____, a client took the required legal and financial steps to make a provision for an estate gift to ___ charity ___, with said gift/bequest to be transferred upon my client's death.

Client's Birth date ___/___/___ Spouse's Birth date ___/___/___

Approximate value of provision \$ _____

Gift designated to (if known) _____

Other pertinent information _____

I am transmitting this information to you subject to our mutual understanding the ___ charity ___ and its staff/agents will hold this information in strictest confidence, and will use this information for no other purpose than to assist the Foundation in estimating the long-term expectations of its planned giving program.

It is further understood that nothing in this statement precludes the possibility the client, with or without my knowledge, will amend, withdraw or otherwise alter the gift of bequest referred to herein.

Date _____

Signed _____ Title _____

Firm _____