

# Letter of Intent for a Planned Gift

## Gift Information:

Cash  
Gift through Will or Living Trust  
Retirement Plan  
Donor Advised Fund (DAF)

Oil & Gas Interests  
Life Insurance Policy  
Charitable Remainder Trust  
Other \_\_\_\_\_  
\_\_\_\_\_

Gifts of Stock  
Real Estate  
Charitable Gift Annuity

Describe your gift below in sufficient detail. For example, the name of living trust, retirement plan account, life insurance policy number, etc. Do you want to create an endowment? Do you have designations?

## Distributions to: (\$ or % optional)

\_\_\_\_\_ American Baptist Home Mission Society  
\_\_\_\_\_ International Ministries  
\_\_\_\_\_ Multi-Region Corporation  
\_\_\_\_\_ American Baptist Foundation  
\_\_\_\_\_ My local Church (Name) \_\_\_\_\_  
\_\_\_\_\_ My Region (Name) \_\_\_\_\_  
\_\_\_\_\_ For the following specific place (i.e. ABCUSA related ministries), purpose or exception:  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_ If the entity is non-ABC, provide the organization name, EIN #, address,  
\_\_\_\_\_  
\_\_\_\_\_

For long-term planning purposes, I/we are pleased to inform the American Baptist Foundation, **EIN #22-2714023**, that as of this date the estimated current value of my/our planned gift is \$\_\_\_\_\_.

The John Mason Peck Society was established in 1996 by the Foundation to recognize and honor those American Baptists who have generously remembered American Baptist ministry and mission in their charitable estate plans.

Feel free to publish my name among your list of John Mason Peck Society members as a motivation to others to leave a future gift. \_\_\_\_\_

Examples: Mr. and Mrs. John Smith – Mary and John Smith – The John Smith Family

Do not list my name as a member of John Mason Peck Society. I prefer to remain anonymous.

Yes      No ABF has my/our permission to share our intention to make a planned gift to  
\_\_\_\_\_ (Gift \$ amount and/or percentages will remain confidential information held by ABF.)

Donor Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Donor Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Printed Name: \_\_\_\_\_

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

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