



LETTER OF INTENT TO BEQUEST

I/we desire to provide for the future wellbeing of the Friends of Alta through a provision in my/our estate plans, and with this letter we are informing Friends of Alta of our plans. I/we understand that this future commitment can be revoked or modified by me/us at any time.

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Name(s)

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Address, City, State

Zip

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Phone

Email

I/we have made a provision to leave a gift to the Friends of Alta, Inc. through my/our:

- Will
- Retirement Plan (IRAm 401(k), or 403(b))
- Living Trust
- Life Insurance Policy
- Other

- You may publish my/our names in your lists of Friends of Alta members as a motivation for others to leave a future gift to benefit Friends of Alta. Please acknowledge us as follows:

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- I/we wish to remain anonymous.
- I/we would like to be included in the Bill and Mimi Levitt Legacy Circle, a program that unites the generous people who have included FOA in their estate planning.

Optional:

I/we wish to inform Friends of Alta, for long-term planning purposes only, that the approximate value of my/our future gift is: \$\_\_\_\_\_. I/we understand that by stating an amount my/our estate is not legally bound by this statement and that I/we may choose to add, subtract, or revoke this bequest at any time, at my/our sole discretion.

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Date

Signature(s)



CHARITABLE GIVING TO FRIENDS OF ALTA

Making a legacy gift to Friends of Alta isn't just for the wealthy or for those trying to minimize estate taxes. It's a wonderful way to leave a legacy and continue a lifetime of support for an organization you believe in. Because gifts grow through the years, virtually any amount will have a magnified effect on our ability to protect the environment of Alta and to provide other important stewardship services to the community we serve.

Legacy gifts can take many forms. For example you can create a lasting legacy through your will or trust. After providing for family, friends and others in their wills, many individuals choose to remember organizations important to them. If you believe in the mission of Friends of Alta, this is an important and lasting way for you to help ensure protections of the Alta environment will always continue.

Unless otherwise designated, all gifts to Friends of Alta are placed in the General Fund of Friends of Alta for use to finance Friends of Alta operations.

SAMPLE BEQUEST LANGUAGE

BEQUEST TYPE	LANGUAGE TO USE
<i>Outright Bequest:</i> an unrestricted gift in which you give the Friends of Alta a specific dollar amount or specified assets, such as securities, real estate, or tangible personal property.	"I give, devise and bequeath to the Friends of Alta, Alta, Utah (insert dollar amount) Dollars to be used for its general purpose. [Instead of a dollar amount, you can also indicate a percentage of your total estate or specifically describe property to be given.]
<i>Residual Bequest:</i> a gift in which you give the Friends of Alta all or a percentage of the remainder of your estate after specific amounts designated for other beneficiaries are distributed and estate related expenses are paid.	"I give, devise and bequeath to the Friends of Alta, Alta, Utah (insert percentage amount) percent of the residue of my estate to be used for its general purposes."
<i>Contingent Bequest:</i> a gift that provides for the Friends of Alta upon the occurrence of a certain event- if, for example, your primary beneficiary does not survive you.	"In the event that (insert name) predeceased me, I give, devise and bequeath his/her bequest or share to the Friends of Alta, Alta, Utah to be used for its general purposes.



FRIENDS  
OF ALTA

*To ensure that your wishes will be fulfilled, please contact a qualified estate planning attorney. If you or your attorney would like Friends of Alta to help you with customized beneficiary language that is specific to your goal and interest, please contact us.*

#### MAKING A GIFT OUTSIDE YOUR WILL

Remembering an organization in your will is one way to make a difference. But there are numerous other assets that can pass directly to a beneficiary organization outside your will. Gifts of cash qualify for a full charitable deduction for most donors who itemize on their federal income tax returns. Donors who make a gift in this way recognize the importance of their annual support and enjoy seeing the immediate results of their generosity. Gifts of appreciated securities are also popular because they save taxes twice. As long as the securities have been held for more than 1 year, the donor can receive an income tax deduction for its fair market value. Additionally, the donor also avoids capital gains tax on the appreciation. Gifts of life insurance afford numerous charitable giving options. The Friends of Alta can be named as the sole beneficiary of a life insurance policy or it can be named as a partial beneficiary, allowing you to share your policy amount between multiple beneficiaries. A policy that is paid up can earn the donor an income tax deduction when the ownership is transferred to the Friends of Alta. Please consult your tax advisor.

#### FRIENDS OF ALTA INFORMATION FOR GIFTING PURPOSES

Friends of Alta should be named in this way:

FRIENDS OF ALTA, INC.

Friends of Alta's address & contact information:

Friends of Alta  
PO Box 8126  
Alta, UT 84092

Jen Clancy, Executive Director  
[jen@friendsofalta.org](mailto:jen@friendsofalta.org)  
801-742-9719

Federal tax identification number:

94-2856217

Relationship:

501c3 public charity