

[Donor Full Name]
[Address]
[City, State, Zip Code]
[Email Address]
[Phone Number]

[Date]

[Recipient Name/Organization Name]
[Attn: Legal or Planned Giving Department]
[Address]
[City, State, Zip Code]

RE: Letter of Intent Regarding Philanthropic Giving and Charitable Trust Structuring

Dear [Name of Contact Person],

I am writing to formally express my intention to establish a structured philanthropic gift to support the mission of [Name of Organization]. After careful consideration of my financial planning and charitable goals, I wish to initiate the process of structuring a [Type of Trust, e.g., Charitable Remainder Trust / Charitable Lead Trust].

The preliminary details of the proposed structure are as follows:

- **Asset Contribution:** [Description of assets, e.g., cash, publicly traded securities, real estate] with an estimated value of [Amount].
- **Trust Structure:** [Specify if it is a CRAT, CRUT, or Lead Trust].
- **Beneficiary Designation:** [Name of Organization] shall serve as the [Remainder/Lead] beneficiary.
- **Purpose of Funds:** The proceeds are to be directed toward [Specific Program/General Endowment/Scholarship Fund].

I am currently working with my legal and financial advisors, [Advisor Name/Firm], to draft the formal trust instrument. I request that your development office provide any specific language or tax identification information required to ensure the trust meets your organization's gift acceptance policies.

This letter serves as a statement of intent and is not a legally binding pledge until the final trust documents are executed. Please acknowledge receipt of this letter and provide the name of the primary point of contact for our legal team to coordinate the next steps.

Thank you for the impactful work you do. I look forward to finalizing this contribution.

Sincerely,

[Signature]

[Donor Printed Name]