

**Sample Legacy & Planned Gift Statement of Intent**

Treasurer's Office  
New York Yacht Club Foundation  
37 West 44<sup>th</sup> Street  
New York, NY 10036

Re: Planned Gift Statement of Intent

Dear New York Yacht Club Foundation:

I/we want to make the New York Yacht Club Foundation aware that I/we have provided for the Foundation through a planned or deferred gift.

My/our planned gift is in the form of a:

- Bequest
- Testamentary Trust
- Charitable Remainder Trust:  Annuity or  Unitrust  Charitable Gift Annuity
- Beneficiary Designation

Type:

Other (please describe): \_\_\_\_\_

Current estimated value: \_\_\_\_\_ (A good faith current estimate is all that is needed.)

My philanthropic plans for the New York Yacht Club Foundation are:

Revocable  Irrevocable  Anonymous

Gift designation:

- Unrestricted
- Restricted (Please indicate purpose: \_\_\_\_\_)

Name(s): \_\_\_\_\_

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

Telephone: \_\_\_\_\_

E-mail: \_\_\_\_\_

Signature: \_\_\_\_\_ \*

Signature: \_\_\_\_\_ \*

Date: \_\_\_\_\_

\*Note for couples: We are happy to list you either separately or as a couple, depending on your preference. If you would like to be recognized as a couple, please complete this form accordingly. If you are making separate planned gifts and prefer to be listed individually in all documents and/or publications, please submit separate forms, one in each name.

Please note, completing this form only informs the New York Yacht Club Foundation of your plans. It does not obligate you in any way. The New York Yacht Club Foundation recommends that all persons considering a planned or deferred gift consult with their professional advisors. Also, the Foundation encourages its supporters to discuss their plans with staff to ensure their wishes are understood and that the Foundation can comply with those wishes.