



LETTER OF INTENT FOR ESTATE GIFT

I/we desire to provide a legacy of support to the Montecito Retirement Association dba Casa Dorinda through a provision in my/our estate plans, and with this letter, I/we are informing Casa Dorinda of our plans. I/we understand that this future commitment can be revoked or modified by me/us at any time.

Name/s _____

Address _____

City, State, Zip _____

Phone _____

Email _____

I/we have made a provision to leave a legacy to Casa Dorinda through my/our:

Will/Trust

Life Insurance Policy

Donor-Advised Fund

Retirement Plan or IRA, Financial Institution: _____

Other: _____

I/we wish to inform Casa Dorinda, for long-term planning purposes only, that the current value of my/our estate gift is \$ _____. (Disclosure of this amount is optional and kept confidential; if your gift is a percentage of your estate, please indicate the approximate value of your gift). I/we understand that by stating an amount my/our estate is not legally bound by this statement.

This gift is:

Unrestricted

Restricted as follows: _____

You may recognize my/our name(s) among the Sequoia Society members as motivation for others to leave a future gift to Casa Dorinda. I/we wish to be listed in the following way: _____

I/we do not want our names published (anonymous gift).

Date

Signature

Signature