

CONFIDENTIAL STATEMENT OF INTENT – ESTATE GIFT

It is my (our) pleasure to inform you that I (we) have named Independence Historical Trust (INHT) in Philadelphia, Pennsylvania as a beneficiary of an estate gift. This letter signifies my (our) intention to make a bequest through my (our) estate plan of approximately \$_____ for the further benefit of _____.
(INHT GENERAL DONATION, A SPECIFIC FUND/PROJECT, A PROGRAM, ETC)

This gift will take the form of _____.
(WILL, LIFE INSURANCE, ANNUITY, TRUST, IRA/RETIREMENT PLAN)

Understanding that this gift intention may be changed at any time, I (we) will inform you should I (we) change my (our) intent toward Independence Historical Trust or should the dollar value of my (our) estate's potential donation significantly increase or decrease.

My (our) gift to Independence Historical Trust will help preserve and protect the most historic square mile, Independence National Historical Park, for the enjoyment of future generations.

☐ I have enclosed a copy of my relevant estate plans as they pertain to Independence Historical Trust.

Please ☐ include ☐ do not include my name in Independence Historical Trust's publications.

Signature

Date

Signature

Date

Name(s): _____

Address: _____

Phone: _____ E-mail: _____

*Thank you for sharing this information to ensure that when the times comes, Independence Historical Trust understands and can abide by your gift intentions.
Your plans will remain confidential.*

Please return to: Independence Historical Trust, 143 S. Third Street, Philadelphia, PA 19106

As with any decision involving your assets, we urge you to seek the advice of your professional counsel when considering a gift to Independence Historical Trust.

July 2021