



Dear Friend,

Thank you for your support of the Davis Phinney Foundation through a planned or estate gift. Planned giving is an excellent way to save on your taxes this year through charitable giving. An estate plan may also help you to avoid capital gains tax, estate taxes or offer other benefits to you and your family. Leaving a bequest to the Foundation in your will is an excellent way to assure our important programs continue years into the future. If you are interested in ideas to help you plan and save for the future, a planned giving approach can help you achieve your goals. With a planned gift, you can also create your legacy while furthering our charitable mission in support of families affected by Parkinson's Disease, now and into the future.

The goal of this short, planned giving "Statement of Intent" is to help us support your planned giving goals and recognize your wishes. Please fill it out and return a copy to the Foundation for our records. If you have questions about your specific situation, bequests, estate plans or tax savings, please don't hesitate to contact us. We would be happy to provide you with a personal illustration and answer any questions you may have about charitable plans.

We are happy to help. Please let us know if we can be of assistance to you in reaching your goals.

Sincerely,

Richard Cook  
Director of Development  
Email: [rcook@dpf.org](mailto:rcook@dpf.org)  
Telephone: 1-866-358-0285



## Planned Giving Statement of Intent

This statement is an expression of my intent to provide financial contributions to the Davis Phinney Foundation (The Foundation) through a planned or estate gift. The provision(s) made include the following:

- \_\_\_\_\_ An outright bequest upon the passing of the donor, or the passing of the donor and spouse.
- \_\_\_\_\_ A life insurance policy, in which The Foundation is named as beneficiary or owner and beneficiary.
- \_\_\_\_\_ Retirement assets, in which The Foundation is named as a beneficiary.
- \_\_\_\_\_ A trust agreement, with income reserved for the donor, spouse, or other income beneficiary.
- \_\_\_\_\_ Other (please specify) \_\_\_\_\_

The estimated value of my (our) gift is \$ \_\_\_\_\_.

## Purpose

It is my wish that the gift be used:

- \_\_\_\_\_ At the Davis Phinney Foundation’s discretion, to create the greatest impact in our community by supporting its most compelling needs and opportunities.
- \_\_\_\_\_ For the following existing fund(s) or purpose (i.e. research, education, Victory Summit® events, endowment):  
\_\_\_\_\_
- \_\_\_\_\_ To create the following fund (please provide suggested purpose): \_\_\_\_\_  
\_\_\_\_\_

Special circumstances of my gift include:

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I would like to work with the Davis Phinney Foundation to create a memorandum of understanding that details the purpose of my gift.    Yes \_\_\_\_\_    No \_\_\_\_\_



### Recognition\*

The Davis Phinney Foundation appreciates the opportunity to acknowledge your commitment to the community by publicly recognizing your contribution. If you prefer to remain anonymous, however, we will respect your wishes.

- \_\_\_\_\_ I (we) permit the Foundation to use my/our name(s) in printed lists of planned gifts, which may appear in the Foundation’s annual report, newsletter, web site and/or other publications.
- \_\_\_\_\_ I (we) prefer to remain anonymous during my/our lifetime(s). You may recognize my/our gift after you receive it.
- \_\_\_\_\_ I (we) prefer to remain anonymous during and after my/our lifetime(s).

\_\_\_\_\_  
*Donor Signature*

\_\_\_\_\_  
*Date*

Printed Name: \_\_\_\_\_

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

City: \_\_\_\_\_

State: \_\_\_\_\_

Zip Code: \_\_\_\_\_

Phone: (H) \_\_\_\_\_

(W) \_\_\_\_\_

(C) \_\_\_\_\_

email: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

\_\_\_\_\_  
*Spouse’s Signature*

\_\_\_\_\_  
*Date*

Printed Name: \_\_\_\_\_

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

City: \_\_\_\_\_

State: \_\_\_\_\_

Zip Code: \_\_\_\_\_

Phone: (H) \_\_\_\_\_

(W) \_\_\_\_\_

(C) \_\_\_\_\_

email: \_\_\_\_\_

Date of Birth: \_\_\_\_\_



Thank you for your commitment to the Foundation's mission and your investment in its future. If you have any questions or would like assistance in your planning, please contact the Davis Phinney Foundation at 1-866-385-0285 or email Richard Cook at [rcook@dpf.org](mailto:rcook@dpf.org).

*\*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.*