

GENEVA FOUNDATION

of PRESBYTERIAN HOMES

CONFIDENTIAL LETTER OF INTENT

Thank you for your thoughtful inclusion of the Geneva Foundation of Presbyterian Homes in your philanthropic gift plans. We respect your privacy and will note your participation as anonymous until we receive your directive. The Geneva Foundation will expend funds and effort in extending recognition in accordance with the donor's wishes.

Please complete this form and then sign it. By doing so, you indicate to us whether you prefer anonymity or public recognition in the Geneva Foundation's honor roll of donors. You may, at any time, update or change your recognition preference by contacting the Geneva Foundation Office and completing and dating a new recognition form. Thank you.

Name: (Mr., Mrs., Ms., Dr.) _____

Preferred Address _____

City, State, Zip _____

Daytime Telephone _____ E-mail(s) _____

Amount of Pledge \$ _____ Composition of Donation _____ Cash _____ Stock

_____ **This gift is restricted for** _____

Estimated Payment Schedule

Date _____ Amount \$ _____

Date _____ Amount \$ _____

Date _____ Amount \$ _____

Date _____ Amount \$ _____

Date _____ Amount \$ _____

I/We have included the Geneva Foundation in my/our estate plans in the following manner:

___ Bequest ___ Trust ___ Other: Details as follows _____

I/We have provided for: ___ A specific dollar amount of: \$ _____

___ A percentage of our estate equal to an estimated value of: \$ _____

I/We have assigned a portion in the amount of _____ from my/our Resident Admission Fee Refund to the Geneva Foundation and have attached the necessary form.

It is my/our intent to create a named endowment fund. We would like the named endowment fund to be titled:

Per the Geneva Foundation Gift Administration Policies the following conditions may apply to any Major, Named, Restricted and/or Endowment gift.

Pledges:

The Foundation will expect that all pledges in support of the Presbyterian Homes are made in good faith and will be honorably fulfilled by each donor. In return, the Foundation will expend effort and undertake to fulfill its obligations to provide appropriate recognition and to honor the Foundation's commitments to its donors.

- A. Pledges can only be established with a signed "Letter of Intent" form regardless of the future payment to satisfy such pledge. This applies to all major, named, restricted or endowment gifts.
- B. The Foundation will not pursue any unfulfilled pledge commitments through legal means unless the President and CEO determine that special situations or circumstances involving any particular pledge would warrant such actions.

All Gifts:

- A. Providing the donor continues to fund the named fund or endowment and funding remain sufficient for the original intent of the gift; donor wishes will continue to be honored. If, however, the named fund or endowment is not sufficient for the original intent, the donor is deceased, or the donor's family no longer funds the endowment, the Foundation Board has the authority to unrestrict the named fund or endowment for general purposes.
- B. It is recognized that in rare instances the need for any gift may cease to exist. If this occurs, the following procedure will be substantially adhered to:
 - i. The Foundation will notify the principal donor, if still available, and inform them that the Foundation's Board has determined that the particular named building, service program or endowment can no longer serve the purpose originally intended or the intent has been fulfilled with funds remaining.
 - ii. The principal donor can select a purpose for the endowment and/or remaining funds that may then be available for immediate implementation by the Foundation.
 - iii. If, for any reason the original donor is unavailable or should there be no agreement as to the disposition of the endowment and/or remaining funds as originally designated in the Letter of Intent, then income from said endowment and/or any remaining funds shall be used by the Foundation as determined by the Foundation Board with consideration of the original purpose of endowment and or/remaining funds or will be unrestricted for general purposes.

Recognition Preference

____ Please list me/us in your donor recognition communications
If not checked above, you will be recognized as anonymous.

All information provided will be kept strictly confidential.

____ It is my/our intent to satisfy the terms of this pledge to the Geneva Foundation of Presbyterian Homes to be directed toward the intentions stated above. (Gifts of \$5,000 or more will be included as membership and recognition in the Norman and Sarah Barr Society). Please send me an annual reminder.

Signature(s) _____

_____ Date _____