

Donor Intent Form

Instructions for the Completion of a Donor Intent Form



We appreciate your interest in providing financial support to the mission of Faith Lutheran Church.

It is not necessary to complete a Donor Intent Form if you desire for your gift to be used in accordance with the then-current Faith Lutheran Church Gift Policy. However, if you prefer that your gift be used in a particular manner that differs from what the Gift Policy states, you may use the Donor Intent Form to specify your wishes.

If you wish to utilize a Donor Intent Form, please:

- 1) Open the Donor Intent Form found on the church website, complete the information fields, print the document, sign and date it;

OR

Print the form found on the following page, complete the information fields, sign and date it.

- 2) Return one copy of your completed Donor Intent Form to the church office.
- 3) Store a second copy of your completed Donor Intent Form with your estate documents and/or provide a copy of your completed Donor Intent Form to the executor of your estate.

A cover letter is not required. However, you may attach a cover letter to the Donor Intent Form if you wish to specify any of the following:

- A more detailed description of your gift;
- A schedule of how the gift will be funded, if the funding will not occur in a lump sum; and/or
- In what name you prefer the donation be recognized (e.g., your name alone, the names of both you and your spouse, etc.) or if you prefer the donation remain anonymous.

Each individual should complete his or her own Donor Intent Form, to the extent you wish to utilize the form, if a gift is to be funded upon a person's death. (Use one form per person, not per couple, since individuals' estates will be settled separately.)

Please contact Faith Lutheran's Director of Business and Finance or Faith Lutheran's Treasurer if you have questions or need assistance.

Thank you!

Donor Intent Form

Donor Information

Name _____ Street Address _____
Phone _____ City _____
Email _____ State & Zip _____

Gift Information

I intend to provide a gift to Faith Lutheran Church in Clive, Iowa that will be funded:

- As a lump sum donation now.
- Periodically over time according to the attached schedule
- Upon my death in accordance with the terms of my estate documents and/or other beneficiary designation(s).

Statement of Donor Intent

I hereby request that proceeds from this gift be applied in the following manner.

This gift is to be:

- Unrestricted - applied in accordance with the Faith Lutheran Church Gift Policy
- Restricted - applied as follows:

I acknowledge that:

- Non-cash gifts may be converted to cash;
- In the event the Faith Lutheran Church Congregation Council deems my preferred use of the gift proceeds not to be legal, consistent with the mission of Faith Lutheran Church or reasonably practicable, then the Congregation Council may determine how to apply the proceeds of my gift in a manner consistent with the charitable and religious purposes of Faith Lutheran Church; and
- I may replace this donor intent form at any time prior to the transfer of my gift to the church.

Signature

Donor

Date