

ENGLEWOOD HISTORICAL SOCIETY HERITAGE CIRCLE
Non-Binding Letter of Intent (for recognition and stewardship only)



Donor Name(s): _____
Address: _____
City/State/ZIP: _____
Email: _____ **Phone:** _____

I/We have included Englewood Historical Society (“EHS”) in my/our estate plans through (check all that apply):

☐ Will bequest ☐ Revocable trust bequest ☐ Retirement plan beneficiary (IRA/401k/403b)
☐ Life insurance beneficiary ☐ POD/TOD financial account ☐ Other: _____

Estimated gift amount or % (optional; for planning only):

\$ _____ and/or _____ % of my/our estate (or “undesignated amount”)

Purpose of my/our future gift:

☐ Unrestricted (greatest needs)

☐ Restricted to: _____

(If EHS determines the stated purpose is impracticable at the time the gift is realized, I/we authorize the Board to apply the gift to the closest related purpose.)

Recognition Preference:

☐ Please list my/our name(s) as EHS Heritage Circle members exactly as follows:

☐ I/We prefer to remain anonymous (EHS may record my/our membership internally).

Optional documentation enclosed/provided:

☐ Redacted will/trust page ☐ Beneficiary confirmation ☐ Other: _____

Acknowledgment

I/We understand this Letter of Intent is an expression of present intention only and is not legally binding on me/us or my/our estate. I/We may modify or revoke it at any time.

Signature(s): _____ **Date:** _____

Signature(s): _____ **Date:** _____

EHS Acknowledgment (for internal use):

Received by: _____ Title: _____ Date: _____

Organization details for your attorney/plan custodian:

Legal name: Englewood Historical Society

EIN: 222248305

Address: P.O. Box 8136, Englewood, New Jersey 07631

Contact: Jane Kendall • jane.e.kendall@icloud.com • 206-992-7069

EHS does not provide legal or tax advice; please consult your advisor.