

Planned Gift Statement of Intent

As an indication of my/our desire to provide a legacy of support for Lutheran Social Services of Wisconsin and Upper Michigan (LSS)/LSS Foundation, I/we hereby inform LSS/LSS Foundation that I/we have made a provision for a gift in my/our estate plan. I/We understand that this commitment is revocable and can be modified by me/us at any time.

Donor Information

Full legal name(s): _____

Street address: _____

City: _____ State: _____ Zip: _____

Phone number: _____

Email: _____

Donor Recognition

Yes, you may recognize me/us in donor lists and at events. Please list my/our name as follows:

I/We prefer to remain anonymous during our lifetimes, but you may recognize me/use after my/our gift matures

I/We prefer to remain anonymous

Signature

Donor: _____ Donor: _____

Date: _____ Date: _____

Organization Information

Lutheran Social Services of Wisconsin and Upper Michigan



Address: 6737 W Washington St, Suite 2275, Milwaukee, WI 53214

Phone: (414) 246-2300 | Email: donorservices@lsswis.org

Website: www.lsswis.org

Lutheran Social Services of Wisconsin and Upper Michigan is a 501(c)(3) organization. Federal Tax ID: 39-0816846

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LSS Foundation



Address: 6737 W Washington St, Suite 2275, Milwaukee, WI 53214

Phone: (262) 794-7810 | Email: LSSFoundation@lsswis.org

Website: www.lssfoundation.org

LSS Foundation is a 501(c)(3) organization. Federal Tax ID: 39-1242451

Description of Gift

Bequest through Will or Revocable Trust

Charitable Trust

IRA/Retirement Plan Beneficiary

Life Insurance Beneficiary

Bank/Brokerage/Other Financial Amount

Real Estate:

Please describe: _____

Other: _____

My Future Gift

Is a percentage of my/our estate

Is a specific amount \$

Confidential in its value

With the understanding that values are subject to change, at this time I/we estimate the value of my/our gift in today's dollars is approximately:

Over \$1,000,000	\$1,000,000 - \$500,000	\$499,999 - \$250,000
\$249,000 - \$100,000	\$99,999 - \$50,000	\$49,999 - \$25,000
\$24,999 - \$10,000	\$9,999 - \$100	

By stating an amount, the donor is not legally bound by this statement and the donor may choose to add, subtract, or revoke this gift at any time. Decision making is at the sole discretion of the donor.

Donation Option 1

I/We want my/our gift to go to LSS programs to be used immediately

Where most needed

I would like to speak to a representative to discuss how my gift can support a specific purpose

Donation Option 2

I/We want my/our gift to go to the LSS Foundation Endowment to support needs today and long into the future

Where most needed

I would like to speak to a representative to discuss how my gift can support a specific purpose

For office use only

Received by: _____

Received on: _____