

### Logan's Legacy Planned Gift Statement of Intent

Thank you for your commitment to Logan's Legacy. To better understand your gift extensions, we ask that you please complete this form with as much detail as you are comfortable sharing. The information you provide is not legally binding and if you wish this statement is revocable and may be modified at any time.

#### Your Contact Information:

You will receive occasional email updates from Logan's Heart and Smiles. We will not share your contact information.

Name(s): \_\_\_\_\_.

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

City, State, Zip: \_\_\_\_\_.

Email: \_\_\_\_\_.

Phone (Home/Cell): \_\_\_\_\_.

#### Type of Gift:

- Bequest through Will or Revocable Trust
- Charitable Trust
- IRA/Retirement Plan Beneficiary
- Life Insurance Beneficiary
- Bank/Brokerage/Other Financial Account
- Other \_\_\_\_\_.

**My Future Gift:**

- Is a percentage of my/our estate \_\_\_\_\_ %.
- Is a specific amount \$ \_\_\_\_\_.
- Confidential in value.
- With the understanding that values are subject to change, at this time I/we estimate the value of my/our gift to be approximately \$ \_\_\_\_\_ in today's dollars.

**Purpose of Future Gift:**

- This gift is to be unrestricted and may be used where the need is greatest.
- This gift is to be used to support the following project(s) or program(s): \_\_\_\_\_.

Additional Directions or Information about your Gift: \_\_\_\_\_.

**Donor Recognition:**

- Yes, you may recognize me/us in donor lists, social media, website, and at events. Please list my/our name as follows: \_\_\_\_\_.
- I/We prefer to remain anonymous during our lifetimes, but you may recognize me/us after the gift matures as follows: \_\_\_\_\_.
- I/We prefer to remain anonymous indefinitely.

**Organization Information:**

Logan James Herr Foundation Inc dba Logan's Heart and Smiles  
Phone: 608-712-7600  
PO Box 259881  
Madison, WI 53725

Logan James Herr Foundation, Inc. is a 501(c)(3) organization.

Federal Tax ID: 41-2043279

This form can be returned to our PO Box above, emailed to Angela at [awallace@logansheartandsmiles.org](mailto:awallace@logansheartandsmiles.org), or texted to 608-604-2165