



2419 NORTH POINT DRIVE
STEVENS POINT, WISCONSIN 54481
715-575-1444
GIVING@FRIENDSOFSCHMEECKLE.ORG
FRIENDSOFSCHMEECKLE.ORG

Planned Giving: Letter of Intent

I/we intend to include the **Friends of Schmeeckle Reserve, Inc.** in my/our estate plan to ensure the financial sustainability of the organization into the future. The Friends mission is to support and advocate for the work of Schmeeckle Reserve through engaging the local and wider communities. I/we acknowledge my/our confidence in the Friends of Schmeeckle with a qualifying commitment as indicated below:

- I/we have made a provision for the **Friends of Schmeeckle Reserve, Inc.** in my/our will or other financial estate planning document.
- I/we plan to include the **Friends of Schmeeckle Reserve, Inc.** in my/our will or other financial estate planning document, and I/we will notify you when those plans are completed.

Giving Method

I/we plan to make a provision for the Friends of Schmeeckle Reserve as indicated below (check all that apply):

- Outright Cash Gift
- Bequest in Will/Trust
- Life Insurance Policy
- Gift of Property
- Qualified Charitable Distribution (QCDs)
- Beneficiary Designation (IRA, 401(k), Donor Advised Fund, Savings Account)
- Gift of Appreciated Securities (stocks, bonds, mutual funds)
- Life Income Gift (charitable remainder of trust annually)
- Other (please specify) _____

Gift Designation

I/we plan for my/our gift to be designated to the following (check all that apply):

- Friends Endowment Fund (held at the Community Foundation of Central Wisconsin): Principal remains intact, while interest earnings can be spent
- Friends Capital Improvement Fund (held at the Community Foundation of Central Wisconsin): Both principal and interest earnings can be spent
- Establish a Designated Endowment Fund in my/our name(s), with annual earnings gifted to the Friends
- Designate gift for a specific use (please specify, if known): _____
- Friends Board can choose how the gift is spent
- Other (please specify): _____

Estimated Gift Amount*

- \$
- Other:

*Please note that including a gift amount is optional; however, it will help the Friends to better plan for the future.

Those who plan to give \$10,000 or more will be inducted into the **Friends of Schmeeckle Legacy Circle**. Legacy Circle members are recognized on a stone wall near the Schmeeckle visitor center.

Recognition

I/we hope to inspire others to consider a gift to the Friends of Schmeeckle. Please acknowledge my/our Letter of Intent with other donors in recognition materials.

How would you like your name(s) to be recognized in donor materials?

I/we prefer to remain anonymous.

Donor Information

Name(s): _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

Signature(s)

Although this Letter of Intent is not a legal obligation and may be changed by either party at any time, it has been made in good faith as a commitment to the Friends of Schmeeckle Reserve, Inc.

Donor Signature(s)

_____/_____/_____

Date

Please complete this letter and mail or email it to:

Friends of Schmeeckle Reserve
2419 North Point Drive
Stevens Point, WI 54481

Email: giving@friendsofschmeeckle.org
Phone: 715-575-1444 (leave a voicemail or text)
Web: friendsofschmeeckle.org/planned-giving/

For more information, contact Jerry Lineberger, the Friends giving chair, at 715-575-1444 (leave a voicemail or text) or giving@friendsofschmeeckle.org.

Note: The Friends of Schmeeckle Reserve, Inc. is a nonprofit, 501(c)(3) public charity with Federal ID #46-4511784. Be sure to include **Friends of Schmeeckle Reserve, Inc.** with any designations.

Thank you for your generous support of the Friends of Schmeeckle!