BERNARDSVILLE
LIBRARY FOUNDATION

Letter of Intent for Estate Gift

I/we desire to provide for the future well-being of the Bernardsville Public Library through a provision in my/our estate plans. With this letter, we are informing the Bernardsville Library Foundation of our plans. I/we understand that my/our plans can be revoked or modified by me/us at any time.

Name(s): _____

Address: _____

City, State, Zip code: _____

Phone Number: _____ Fax Number: _____

Email Address: _____

I/we have made a provision to leave a legacy to the Bernardsville Library Foundation through my/our:

_____ Will* ____ Retirement Plan or IRA ____Other

_____ Living Trust ____ Life Insurance Policy

*See suggested language for a bequest below

____ I/we wish to inform the Bernardsville Library Foundation, for planning purposes, that the estimated value of my/our future gift is: $_____. If the gift is a percentage of your estate, please indicate the approximate value and percentage_____ . This information will be kept confidential.

I/we understand that, by stating an amount, my/our estate is not legally bound by this statement and that I/we may choose to add, subtract, or revoke this bequest at any time, at my/our sole discretion.

_____ _____ _____

Date Signature Signature

If your circumstances change, a bequest in your will or trust may no longer be possible or appropriate. We recognize that your family comes first. You can change your mind about a bequest at any time.

SUGGESTED LANGUAGE FOR A BEQUEST: ARTICLE SIXTH (dated 4/29/2011)

SIXTH: I give and bequeath $_____to the Bernardsville Library Foundation, Inc. If the named Foundation is not an organization described in Section 170(c) of the Internal Revenue Code of 1954 at the time when the bequest is to be distributed to it, then my Executor shall pay over this bequest to one or more organizations then described in Section 170(c) as my Executor shall elect to his or her sole discretion.