

Planned Gift Letter of Intent



Name of Donor(s)

Mailing Address

Email

Telephone

Birthdate(s)

I (we) have included San Antonio Oasis as a beneficiary in one or more of the following:

☐ Will or Living Trust ☐ Retirement Plan Assets ☐ Annuity ☐ Life Insurance Policy

☐ Other (please describe) _____

Current estimated value of my
legacy gift (optional)

☐ Attached is a copy of the relevant portions of the legal documents relating to my/our future gift to Oasis or a letter from my legal or financial advisor that describes the nature and purpose of the gift. (Optional)

Purpose (please indicate the way you wish your gift to be used)

Oasis's policy is to direct bequests and estate gifts to be used toward the organization's greatest needs. If you would like your planned gift to support a specific purpose, please note that below so we can work with you to ensure that your wishes can be honored.

☐ Unrestricted, for the greatest needs of San Antonio Oasis, *OR*

☐ For the specific purpose of: _____

Recognition

☐ I would like my (our) gift to be anonymous, *OR*

☐ I would like to have my name (our name) listed as: _____

☐ Please contact me to learn why I/we have chosen to make a legacy gift to San Antonio Oasis.

Signature

Signature

Date

Date

Please return this form to:

San Antonio Oasis
Attn: Ginny Brown
700 Babcock Road
San Antonio 78201

You may also email to gbrown@oasisnet.org.

This is not a legally binding contract, but merely an expression of the donor's current intent. Donors are encouraged to seek legal and financial planning advice prior to making charitable gifts. Oasis does not provide legal, financial or tax advice.