



# CONFIDENTIAL INTENTION FORM



Dear Donor,

We realize that many people who plan to support the American Council of Learned Societies through their estate and/or financial plans prefer to keep their intentions private. However, by letting us know of your plans, we can thank you during your life, and confirm that we are able to fulfill your stated intentions.

Please know that completing this form is non-binding – we understand that you may change your plans at any time. Please also know that all information you share with us is kept strictly confidential.

Mary Richter  
Chief Development Officer  
American Council of Learned Societies  
Phone: 646-485-5951  
Email: mrichter@acsls.org

## PLANNED GIFT NOTIFICATION- CONFIDENTIAL

Personal Information

Name: \_\_\_\_\_

Spouse Name: \_\_\_\_\_

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Date(s) of Birth: \_\_\_\_\_

### THE 1919 SOCIETY

To recognize those who have invested in ACLS and have realized the important legacy a planned gift creates, ACLS has established The 1919 Society. Named for the year of our founding, The 1919 Society acknowledges forward-thinking benefactors who partner with ACLS to help keep the humanities vital and relevant for future generations.

Everyone who has notified ACLS of an estate intention is recognized as a member of The 1919 Society.





**YOUR GIFT INTENTION**

Please provide the following information and attach a copy of the documentation or appropriate language from your will or trust, if available. Please complete all that apply.

- I/We want to support the mission of the American Council of Learned Societies through a planned gift as described below:
  - I/We have included a bequest for ACLS in my/our will or living trust.
  - I/We have named ACLS as a beneficiary of an asset:
    - Retirement Plan                       Bank, Investment, or Other Financial Account
    - Life Insurance Policy                       Other: \_\_\_\_\_
  - I/We have named ACLS as a revocable/irrevocable (circle one) beneficiary of a charitable remainder trust.

The anticipated value of my/our gift is/will be approximately \$ \_\_\_\_\_ or \_\_\_\_\_ % of my/our estate. (If possible, please include a copy of the bequest language or other wording describing your planned gift.)

Please provide a general description of the gift provision (such as, asset to be donated if other than cash or securities, how gift is to be used, whether gift is to create an endowment, etc.):

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- Yes, you may include me/us in listings of planned gift donors.

Please indicate how you would like your name(s) to appear in our 1919 Society listings. (Please note the amount of your intended gift will not be published):

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- No, please do not include me/us in listings.

Signature(s): \_\_\_\_\_

\_\_\_\_\_

Date: \_\_\_\_\_

Return form to:  
 Mary Richter  
 Chief Development Officer  
 American Council of Learned Societies  
 633 Third Avenue, New York, NY 10017-6706  
 Phone: 646-485-5951  
 Email: mrichter@acl.org

