

LORD ACTON LEGACY SOCIETY

"Liberty is not...the power of doing what we like, but the right of being able to do what we ought"

-LORD ACTON



LETTER OF INTENT

Thank you for including the Acton Institute in your estate plans. Welcome to the **Lord Acton Legacy Society!** Please share about your legacy gift so we can understand the inspiration behind it and honor your intention to the best of our ability when it is received.

I have included the Acton Institute as a beneficiary of my estate plans as follows:

- | | | |
|---|---|---|
| <input type="checkbox"/> Bequest in a Will or Trust | <input type="checkbox"/> Retirement Plan | <input type="checkbox"/> Life Insurance Policy |
| <input type="checkbox"/> Investment or Bank Account | <input type="checkbox"/> Donor-advised Fund | <input type="checkbox"/> Charitable Remainder Trust |
| <input type="checkbox"/> Other Property or Provision: _____ | | |

I estimate the current value of this gift to be \$_____ **(confidential).**

NOTE If you designated the Acton Institute as a beneficiary of a will or trust, please share/attach the date that the trust was executed, the name and contact information for the executor or attorney, and a copy of the page in your will or trust designated your gift. If you designated the Acton Institute as a beneficiary of an account or policy, please share/ attach the custodian and account number or a recent statement.

EXECUTOR, ATTORNEY, CUSTODIAN, OR OTHER CONTACT INFORMATION

ACCOUNT OR POLICY NUMBER(S)

I would like my gift to be directed to:

☐ The Acton Institute's greatest need

☐ Other: _____

If at any time it becomes impossible or impractical for my gift to be used for the above designated purpose, the Acton Institute for the Study of Religion and Liberty shall use my gift for a purpose and in a manner that it determines most closely meets the above designated purpose.

For special instructions or requests, such as endowment or naming, please contact our development team at legacy@acton.org. If special instructions have been discussed, please attach them.



☐ You may publish my name as a *Lord Acton Legacy Society member* to motivate other supporters to leave a future gift. I would like my name to appear as follows: _____

☐ I would be open to sharing my story and this gift with other Acton Institute supporters and have provided my contact information below.

I understand that this Letter of Intent is not legally binding and is strictly confidential and that I may choose to add, subtract, or revoke this gift at any time at my sole discretion. I will do my best to notify *the Acton Institute* of any significant changes as they occur.

CONTACT INFORMATION

PRINT NAME(S)

DATE(S) OF BIRTH

ADDRESS

CITY STATE ZIP

EMAIL PHONE

SIGNATURE DATE



For questions about this form, the Lord Acton Legacy Society, and its benefits, please contact:

Kevin Augustyn
VP of Development
(720) 218-1781
legacy@acton.org

We would love to hear about your story. What has inspired your gift?

Feel free to share with us or let us know what time of day is best to contact you by phone or email!

Please print this form, fill it out, and mail it to our headquarters at the address below, or send a digital copy to Kevin Augustyn at legacy@acton.org.