



**The Storehouse**  
COMMUNITY CENTER

**The Storehouse Community Center  
Planned Giving Letter of Intent**

I/we wish to notify The Storehouse of Collin County (DBA The Storehouse Community Center; EIN 27-1883333) that I/we have included the organization as a beneficiary of my/our estate plans.

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

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

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

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

Should The Storehouse ever produce physical or online recognition for its Planned Giving Donors, I/we give permission for my/our name to be recognized:

( ) **Yes**, please list my/our name in the following manner: \_\_\_\_\_

( ) **No**, I/we wish to remain anonymous.

Please share your story. Tell us why you chose to make this planned gift:

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**NOTICE TO DONOR:** All information provided will be kept in the strictest confidence. We will use this information for planning purposes only and as an indicator of your intentions.

In order for us to appropriately plan for future gifts, please provide us with as much of the following information as you are comfortable (this is not required):

**Gift Vehicle** (Please see attached Definition of Terms for more information)

I/we have designated The Storehouse (EIN 27-1883333) as a partial or full beneficiary of (please complete this page for each separate Gift Vehicle for which you have designated The Storehouse):

<input type="checkbox"/> Will	<input type="checkbox"/> Charitable Gift Annuity
<input type="checkbox"/> Savings Account or CD	<input type="checkbox"/> Charitable Remainder Trust
<input type="checkbox"/> Qualified Retirement Plan	<input type="checkbox"/> Fund/Trust
<input type="checkbox"/> Life Insurance	<input type="checkbox"/> Other _____

**Value**

Approximate value of gift. Or, if not known, percentage of Gift Vehicle: \_\_\_\_\_

Timing of gift (if anticipated to be realized other than as part of estate): \_\_\_\_\_

*If possible, please attach a copy of the portion of your will or other documents that include The Storehouse as a beneficiary.*

**Designation** (Please see attached Definition of Terms for more information)

\$ \_\_\_\_\_ or \_\_\_\_\_ % to Operations

\$ \_\_\_\_\_ or \_\_\_\_\_ % to Endowment

*Note: Total should add up to either approximate value of gift, or 100%*

*\*Please call The Storehouse (469.304.8772) if you prefer to designate your gift to a specific purpose.*

**Professional Advisor**

Name \_\_\_\_\_ Phone \_\_\_\_\_

Firm \_\_\_\_\_ Email \_\_\_\_\_

Address \_\_\_\_\_

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

**Estate Executor or Trustee**

Name \_\_\_\_\_ Phone \_\_\_\_\_

Relationship \_\_\_\_\_ Email \_\_\_\_\_

Address \_\_\_\_\_

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

**Family Liaison**

Name \_\_\_\_\_ Phone \_\_\_\_\_

Relationship \_\_\_\_\_ Email \_\_\_\_\_

Address \_\_\_\_\_

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

Signature \_\_\_\_\_ Date \_\_\_\_\_

**PLEASE RETURN COMPLETED FORM TO:**

The Storehouse Community Center  
c/o Fundraising Department  
1401 Mira Vista Boulevard  
Plano, Texas 75093

*Thank you for your legacy gift to feed, clothe,  
and care for our neighbors.*

In order for us to appropriately plan for future gifts, please provide us with as much of the following information as you are comfortable (this is not required):

**Gift Vehicle (Page 2; Only Complete if Needed)**

I/we have designated The Storehouse (EIN 27-1883333) as a partial or full beneficiary of (please complete this page for each separate Gift Vehicle for which you have designated The Storehouse):

___ Will	___ Charitable Gift Annuity
___ Savings Account or CD	___ Charitable Remainder Trust
___ Qualified Retirement Plan	___ Fund/Trust
___ Life Insurance	___ Other _____

**Value**

Approximate value of gift. Or, if not known, percentage of Gift Vehicle: \_\_\_\_\_

Timing of gift (if anticipated to be realized other than as part of estate): \_\_\_\_\_

*If possible, please attach a copy of the portion of your will or other documents that include The Storehouse as a beneficiary.*

**Designation**

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\$ \_\_\_\_\_ or \_\_\_\_\_ % to Endowment

*Note: Total should add up to either approximate value of gift, or 100%*

*\*Please call The Storehouse (469.304.8772) if you prefer to designate your gift to a specific purpose.*

**Professional Advisor**

Name \_\_\_\_\_ Phone \_\_\_\_\_

Firm \_\_\_\_\_ Email \_\_\_\_\_

Address \_\_\_\_\_

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

**Estate Executor or Trustee**

Name \_\_\_\_\_ Phone \_\_\_\_\_

Relationship \_\_\_\_\_ Email \_\_\_\_\_

Address \_\_\_\_\_

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

**Family Liaison**

Name \_\_\_\_\_ Phone \_\_\_\_\_

Relationship \_\_\_\_\_ Email \_\_\_\_\_

Address \_\_\_\_\_

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

Signature \_\_\_\_\_ Date \_\_\_\_\_

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**Gift Vehicle (Page 3; Only Complete if Needed)**

I/we have designated The Storehouse (EIN 27-1883333) as a partial or full beneficiary of (please complete this page for each separate Gift Vehicle for which you have designated The Storehouse):

___ Will	___ Charitable Gift Annuity
___ Savings Account or CD	___ Charitable Remainder Trust
___ Qualified Retirement Plan	___ Fund/Trust
___ Life Insurance	___ Other _____

**Value**

Approximate value of gift. Or, if not known, percentage of Gift Vehicle: \_\_\_\_\_

Timing of gift (if anticipated to be realized other than as part of estate): \_\_\_\_\_

*If possible, please attach a copy of the portion of your will or other documents that include The Storehouse as a beneficiary.*

**Designation**

\$ \_\_\_\_\_ or \_\_\_\_\_ % to Operations

\$ \_\_\_\_\_ or \_\_\_\_\_ % to Endowment

*Note: Total should add up to either approximate value of gift, or 100%*

*\*Please call The Storehouse (469.304.8772) if you prefer to designate your gift to a specific purpose.*

**Professional Advisor**

Name \_\_\_\_\_ Phone \_\_\_\_\_  
Firm \_\_\_\_\_ Email \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

**Estate Executor or Trustee**

Name \_\_\_\_\_ Phone \_\_\_\_\_  
Relationship \_\_\_\_\_ Email \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

**Family Liaison**

Name \_\_\_\_\_ Phone \_\_\_\_\_  
Relationship \_\_\_\_\_ Email \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

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## Definition of Terms

### **Gift Vehicles: The method by which you will make your gift.**

- Will: This is one of the most straightforward ways for donors to continue stewardship to The Storehouse upon their death. To include The Storehouse in your will, simply add the following sentence: “I gift to The Storehouse of Collin County, DBA The Storehouse Community Center (EIN 27-1883333), \_\_\_\_\_ [dollar amount, description of specified asset, or percentage of the estate] for its unrestricted use and purpose.”
- Savings Account or CD: By making The Storehouse the beneficiary of some or all of your Savings Account(s) or CD(s), you can allow The Storehouse to receive the benefit of the interest earned and maximize the impact of your donation.
- Qualified Retirement Plan: Examples include 401(k)s, IRAs, and 403(b)s. By designating some or all of your retirement assets to The Storehouse, you can bypass estate and income taxes on these assets and instead utilize them for a cause that is important to you.
- Life Insurance: Designating The Storehouse as the beneficiary of your life insurance policy will allow The Storehouse to receive some or all of the death benefit payout at the end of your life, while also removing the value of the death benefit from your taxable estate.
- Charitable Gift Annuity: This gift can be structured through our partners at HighGround Advisors and allows you to make a gift of cash or marketable securities for the benefit of The Storehouse while also providing an annuity to you for life.
- Charitable Remainder Trust: Provide support for The Storehouse while also retaining an income stream from the gifted property for the duration of your lifetime or for a specified term of years. Remainder trusts can be funded with almost any asset and provide you with a charitable income tax deduction in the year the gift is made.
- Fund/Trust: There are a wide range of Trusts and Funds (Revocable Trusts, Charitable Lead Trusts, etc.) for which you can name The Storehouse as a beneficiary and realize tax benefits or further other planning priorities.

### **Designations: The way in which you would like your gift to be utilized.**

- Operating: The Storehouse may immediately use the full amount of the gifted funds for either the purpose the donor designated in this LOI or their Gift Vehicle, or for the immediate needs of The Storehouse if the donor did not designate a specific purpose.
- Endowment: Upon receipt of funds, The Storehouse will invest the funds in a permanent endowment and each year will be able to use only the investment earnings for either the purpose the donor designated in this LOI or their Gift Vehicle, or for the immediate needs of The Storehouse if the donor did not designate a specific purpose.

*Thank you to our partners at HighGround Advisors for their support in providing this Definition of Terms.*