



THE SEMINAR NETWORK LETTER OF INTENT

The Seminar Network brings together the country’s top business and philanthropic leaders committed to advancing a society in which people succeed by helping others—one that maximizes peace, civility, and well-being for all. History demonstrates the principles of a society of mutual benefit are the most effective way to help people improve their lives, especially the least fortunate, and to make the world a more peaceful and prosperous place.

Thank you for informing us of your intention to include organizations within The Seminar Network in your will or estate plan, or as a charitable beneficiary of your retirement plan, life insurance, or other assets. As such, you will be part of the Lewis Street Legacy Society, and we are grateful for your deep commitment to the advancement of a society of mutual benefit.

The Lewis Street Legacy Society was created to recognize and express appreciation for those who seek to provide a lasting legacy of freedom by making estate plans or establishing life income gifts to benefit organizations within The Seminar Network. By doing so, members of the **Lewis Street Legacy Society** support this Network’s work to ensure these principles thrive for generations. This extraordinary commitment will enable The Seminar Network to continue its efforts to promote a society of mutual benefit through our country’s core institutions, such as education, community associations, business, and government.

Please complete this form to notify The Seminar Network team of your generous intention.

The details will remain confidential.

Name(s): _____

Date(s) of Birth: _____

Address: _____

City, State, Zip: _____

Email: _____ Phone: _____

Additional Information:

When planning an estate gift, you may consider how you would like your gift to be used to benefit the work of The Seminar Network in the future—whether you wish to designate your gift for a specific entity or purpose within The Seminar Network or to leave it up to the leadership team at The Seminar Network to determine the highest value use of your funds. If desired, please indicate how you wish your gift to be designated:

By making this gift, you become a member of the **Lewis Street Legacy Society**. To recognize your generosity and to inspire others to make similar gifts, we would like to list your name in select Seminar Network communications. The nature and size of your estate gift will be kept strictly confidential. Please indicate your preference below.

I am willing to be listed as a **Lewis Street Legacy Society** member.

Please list name(s) as: _____

I prefer to remain anonymous for this gift.

Type of Bequest: The following information is helpful to The Seminar Network for planning purposes. Please check all that apply and estimate the value of each gift in today's dollars.

Will: \$ _____

Beneficiary of a Trust: \$ _____

Insurance Policy: \$ _____

Retirement Plan/IRA: \$ _____

Real Estate: \$ _____

Other Asset(s): \$ _____

Additional Information: _____

(Attachments or letters that further describe the nature of the above intention(s) is welcomed in addition to that section of the will or trust in which the beneficiary institution is mentioned.)

The Seminar Network wishes to assure you that this statement of intention does not constitute a legal obligation and will not be legally binding in any way on you, your heirs, or your estate. Further, The Seminar Network understands that the size of your gift may be different from the amount estimated above.

Signature(s): _____ Date: _____

Signature(s): _____ Date: _____

Thank you for your generous and vital support of The Seminar Network. If you have questions or would like additional information, please contact: Mark P. McConnell, CFP®.

- Call: (571) 290-7338
- Email: mmcconnell@seminarnetwork.org

Please return this completed form to: The Seminar Network, 2300 Wilson Blvd. Suite 500, Arlington, VA 22201.

***Please Note:** While the organizations in the Seminar Network share the vision for a society of mutual benefit, each engages in activities consistent with its nonprofit status. Please consult your legal/tax advisor regarding any tax consequences of these giving opportunities.*