



SAMPLE CONFIRMATION LETTER

Instructions for use:

As with any gift, it is appropriate to acknowledge the donor and their intention to leave a legacy gift through a letter and / or call from a staff or board member.

Additionally, people who include an organization in their estate plans will often increase giving throughout their lifetime. Continue to steward these donors and provide them with regular updates on the organization's work and the opportunities to further your efforts now.

Dear {Donor},

{Acknowledge meeting and conversation - Thank you for taking the time to meet / our coffee / etc. I am glad you share in our excitement about our new initiative / I appreciated your feedback on our recent program.}

We are grateful that you have included {Organization Name} in your estate plans and informed us of your intent to leave a legacy gift. Your generosity will help our work for future generations, and it will ensure your values will be honored beyond your lifetime.

As noted on your Letter of Intent form, we will acknowledge your commitment in {annual report, website, etc.} as "{Listing}". Additionally, we look forward to updating you on our current work through {newsletter, events, etc.}.

For your convenience in order to complete any paperwork for your legacy gift, please note that our legal name is {LEGAL Organization Name} and our EIN is {TAX ID} with a mailing address of {LEGAL ADDRESS}.

Should you have any questions or would like to discuss additional ways to support {Organization Name}, please reach out {Contact} at {Phone} or {Email}.

With gratitude,

{Signatory}

{Name}

{Title}