



St. Martin's by-the-Lake
Episcopal Church Foundation
2801 Westwood Road
P.O. Box 38
Minnetonka Beach, MN 55361

St. Martin's by-the-Lake Foundation Living Legacy Gift Intention Form

I/We intend to support St. Martin's by-the-Lake as indicated below:

- ☐ Give to St. Martin's by-the-Lake Foundation now
☐ Give to St. Martin's by-the-Lake Foundation at a later time

I/We intend to give in the following way[s]:

- ☐ Cash/check/debit/credit
☐ Donation of stock or other appreciated securities
☐ Qualified charitable distribution from an IRA
☐ Charitable gift annuity
☐ Other _____

Please refer to the Gift Acceptance Policy of St. Martin's for guidance relating to gifts.

The expected value of my/our gift is:

- ☐ \$ _____ ☐ exactly ☐ approximately

To Be Given:

- ☐ Once _____ Date _____
☐ Annually _____ Date _____
☐ Other _____ Date _____

I/We understand that this intention is neither a pledge, nor legally binding.

Full Name (print) _____ Date _____

Signature _____

Full Name (print) _____ Date _____

Signature _____

- ☐ Please list me/us as members of the St. Martin's Legacy Circle
☐ I/we wish to remain anonymous

Key contact after my/our lifetime:

Full Name _____ Phone _____

Email _____ Relationship _____

Please share a copy of this form with your professional advisor, estate planning attorney and/or executor(s).

St. Martin's by-the-Lake Foundation is a charitable organization under Section 501(c)(3) of the Internal Revenue Service Code and is exempt from federal income taxation.

The tax identification number of St. Martin's is 41-0694727.

Questions?

Foundation Chair: StMartinsFoundation@stmartinsbythelake.org
Robin Zinn, Financial Administrator: rzinn@stmartinsbythelake.org

CONFIDENTIAL