# **Appendix G: Sample planned giving society interest letter**

*<Date>*

*<Name>*

*<Address>*

*<City, state ZIP>*

Dear *<name>*,

Thank you for your interest in the *<planned giving society name>*. As requested, we are sending you our most recent newsletter about the *<planned giving society name>*, the planned giving and endowment society for *<school name>*.

The *<planned giving society name>* has been established to provide for the future financial needs of *<school name>*. We try to meet the needs of our supporters, so there are many options for becoming a member. One of the simplest ways to join the *<planned giving society name>* is to establish *<school name>* as a beneficiary in your will. This can be done through a standard bequest, retirement account, gift of stock, or real estate. We can also help donors establish charitable annuities that could provide lifetime income for you. Other options include naming *<school name>* as a beneficiary in a life insurance policy or establishing an endowment.

If you choose to make a planned gift for *<school name>*, the only thing we need from you is written notification of your intentions. We are committed to working with you to determine the planned giving options that best meet your needs. Someone from our development team will be following up with you in the near future. If you would like to speak before then, please contact *<name>* at *<contact information>*.

Thank you for supporting *<school name>*. We look forward to working with you. With your help, we can ensure that *<school name>* has a vibrant future for many generations to come.

God bless,

*<Name>*

*<Title>*