

Planned Charitable Gift Notification Agreement



Arlington Neighborhood Village
Neighbors Helping Neighbors Age in Place

This Planned Charitable Gift Notification Agreement ("Agreement") is made on this _____ (date) by and between:

Donor/Donors: _____ ("Donor")

Address: _____

Phone: _____

Email: _____

Charitable Organization: Arlington Neighborhood Village, Inc. ("Donee")

Address: 4000 Lorcom Lane, Arlington, VA 22207

Federal TaxID/EIN: 46-3591812

Phone: 703.509.8057

Email: wendyzenker@ANVarlington.org

Contact Person: Wendy Zenker, Executive Director

1. Purpose of the Agreement: The purpose of this Agreement is to notify the Donee of the Donor's intention to make a planned gift and to outline its terms and conditions.

2. Description of the Planned Gift: The Donor intends to make a planned gift to the Donee through the following means (*select one or more as applicable*):

- ☐ Bequest in Will
- ☐ Charitable Remainder Trust
- ☐ Charitable Lead Trust
- ☐ Life Insurance Policy
- ☐ Personal Property
- ☐ Real Property
- ☐ Retirement Plan Assets (e.g., IRA, 401(k), 403(b) accounts)
- ☐ Other Financial Account Assets (e.g., checking, savings, CDs)

☐ Other (please specify): _____

3. Designation of the Gift: The Donor designates that the gift be used for the following purpose(s):

☐ Unrestricted Support

☐ Specific Program or Fund (please specify): _____

4. Estimated Value of the Gift: The estimated value of the planned gift at the time of this Agreement is \$ _____. This value is subject to change based on the Donor's estate and other factors.

5. Confidentiality: The Donee agrees to keep the details of this Agreement and the Donor's identity confidential unless the Donor provides written consent herein to disclose this information.

6. Donor Recognition: The Donor wishes to be recognized in the following manner (*select one*):

☐ Publicly (Donor Lists, Impact Report, etc.)

☐ Anonymously

☐ Other (please specify): _____

7. Legal and Financial Advice: The Donor acknowledges that the Donee has not provided any legal or financial advice and that the Donor has had the opportunity to see independent legal and financial counsel regarding this planned gift.

8. Modification and Termination: This Agreement may be modified or terminated by the Donor at any time with written notice to the Donee. The Donee acknowledges that the planned gift is revocable and is not binding on the Donor's estate.

9. Governing Law: This Agreement shall be governed by and construed in accordance with the laws of the Commonwealth of Virginia.

10. Signatures: IN WITNESS WHEREOF, the parties hereto have executed this Agreement as of the day and year first above written.

Donor:

Signature: _____

Name: _____

Date: _____

Arlington Neighborhood Village, Inc:

Signature/Title: _____

Name: _____

Date: _____