



Angel Foundation™ Legacy (Planned) Giving

Thank you for your interest in making Angel Foundation™ a part of your lasting legacy by including us in your estate planning. Leaving a legacy (planned) gift to Angel Foundation™ ensures that we will be able to continue to provide financial assistance, education, and emotional support for Minnesotans throughout their cancer journey for years to come.

There are many ways to make a legacy gift, and we recommend consulting your financial advisor or estate planning attorney to determine what may be right for you. Two of the most common ways to make a planned gift are through **Beneficiary Designation** and by **Including Angel Foundation™ in your Will**.

Beneficiary Designation:

You can name Angel Foundation™ as the beneficiary of your checking or savings account, securities in a brokerage account, retirement account, life insurance policy, or Donor Advised Fund. This can be done by requesting a beneficiary designation form from your bank, insurance company, or other financial institution.

Including Angel Foundation™ in your Will:

You can include Angel Foundation™ in your will by leaving either a fixed amount or flexible percentage of your estate to Angel Foundation™, using the following language:

Fixed Amount: "I give to Angel Foundation™, a non-profit organization located at 1155 Centre Point Drive, Suite 7, Mendota Heights, Minnesota 55120, the sum of \$____" (or describe the specific stock or security you intend to leave to Angel Foundation™.)

Flexible Percentage: "I give to Angel Foundation™, a non-profit organization located at 1155 Centre Point Drive, Suite 7, Mendota Heights, Minnesota 55120, ____%, rest, residue, and remainder of my estate, both real and personal property of whatever kind and wheresoever situated."

Angel Foundation™

1155 Centre Pointe Drive, Suite 7
Mendota Heights, Minnesota 55120
Tax ID: 41-1990883

If you have already included Angel Foundation™ in your estate plans, we invite you to fill out the form on the following page and return it to Angel Foundation™ so that we can properly acknowledge and thank you for your gift.

Please contact Kathy Tolo at (612) 627-9000 ext. 516 or ktolo@mnangel.org for additional information on planned giving options.



Angel Foundation™
Letter of Intent for an Estate Gift

I/we desire to provide for the future well-being of Angel Foundation™ through a provision in my/our estate plans, and with this letter we are informing Angel Foundation™ of our plans. I/we understand that this future commitment can be revoked or modified by me/us at any time.

Name(s)

Address City State Zip

() Phone E-mail

I/we have made a provision to leave a legacy to Angel Foundation™ through my/our:

- Will Living Trust
Retirement Plan or IRA Life Insurance Policy
Annuity (please specify) Other (please specify)

Notes:

I/we wish to inform Angel Foundation™, for long-term planning purposes only, that the current value of my/our future gift is: \$. (This amount is kept confidential; if your gift is a percentage of your estate, please indicate the approximate value.) I/we understand that by stating an amount my/our estate is not legally bound by this statement and that I/we may choose to add, subtract, or revoke this bequest at any time, at my/our sole discretion.

Please feel free to publish my/our names as encouragement for others to leave a future gift to benefit Angel Foundation™.

My/Our name should appear as follows:

Please do not publish my/our names.

Date Signature Signature

Please return this form to Kathy Tolo via email: ktolo@mnangel.org or via mail: 1155 Centre Pointe Drive, Suite 7, Mendota Heights, Minnesota 55120