

Why We Want to Know

Every year our organization receives bequests from individuals who had not informed us in advance that they had included us in their wills. We are extremely grateful for these gifts, for they enable us to continue the work that was obviously important to these donors.

There are various reasons why people do not reveal their intentions to us. Knowing that their family circumstances could change and they might have to remove or alter the bequest provision, they may not have wanted to arouse expectations. They may regard a will as a very private matter and not want to reveal provisions to any beneficiaries, whether individuals or institutions. They may have feared that disclosing a bequest provision would invite solicitations. Possibly, they were simply unaware that such information was important to us.

We understand and respect all of the reasons why you might not want to reveal a future gift provision, but we would like to explain why we like to know. First, and foremost, we want to say thank you. We are always sad when we receive a surprise end-of-life gift and never had an opportunity to say thank you to the donor for his or her foresight and thoughtfulness. Second, we would like to honour you by inviting your membership in (*place name of legacy gift society here*), which includes those who have made any future provision for our institution. Third, we would welcome the opportunity to provide information about the impact your gift will have. Fourth, if your gift is very specific in nature, we would want to advise you if we would have difficulty fulfilling your intentions.

Please be assured that information you provide is confidential and that no details about your future gift is disclosed unless authorized by you. Also, disclosure in no sense is a binding commitment, for we understand that circumstances can change. With these assurances, we hope you will consider informing us about any legacy gift you have made through a provision in your will or living trust or by beneficiary designation.