

**Example Letter of Intent**

To: The Middletown Community Foundation  
300 North Main Street, Suite 300  
Middletown, OH 45042

From: John Q. Donor  
1234 Lovely Acres Way  
Middletown, OH 45042

Re: Letter of Intent

---

This letter is to inform you that I have included the Middletown Community Foundation (the Foundation) as a charitable beneficiary of my (will, estate plan, trust) established on (date). Upon my demise, the sum of \$500,000 shall be distributed to the Foundation to establish the *John Q. Donor Memorial Fund*, an endowed designated fund, which will be used to provide annual support to the following organizations in the following proportions under the Middletown Community Foundation’s Distribution Policy:

<u>Organization/Purpose</u>	<u>Percentage</u>
1. Miami University Middletown for the Annual Fund	20%
2. United Way of Greater Cincinnati/Middletown Area	20%
3. Middletown Community Foundation for: <i>Early Childhood Education</i>	20%
4. MidPointe Library System	10%
5. Middletown Community Foundation to be used to support the community’s greatest needs	30%

If any of the above organizations cease to exist or no longer carry out a charitable purpose, the Foundation’s Board of Trustees may select a successor organization providing a similar charitable purpose consistent with my donative intent. Should the Middletown Community Foundation receive a distribution for the abovementioned Fund through my Will, Codicil and/or Trust, and the Will, Codicil and/or Trust sets forth different organizations and/or purposes than those set forth above, then the provisions set forth in the Will, Codicil and/or Trust shall be controlling, provided the execution date of the controlling document is after the date of this Letter of Intent.

By: \_\_\_\_\_  
John Q. Donor

Date: \_\_\_\_\_