



Letter of Intent for a Future Gift

I/We have made a provision for a gift to Shell Point or the Legacy Foundation at Shell Point.

Name(s) as you would like on official record or listing

It is my/our intent to leave a Legacy gift to Shell Point Retirement Community through my/our:

_____ Will _____ Bank/Brokerage Account (POD, TOD) _____ Charitable Remainder Trust _____ Life Insurance
_____ IRA Beneficiary _____ Living Trust _____ Gift Annuity _____ Other

Please enroll me/us in the Legacy Society under the following conditions:

_____ Feel free to publish my/our names among your list of Legacy members (the amount of your gift will not be published.) I/We wish to have my/our name(s) appear as follows:

_____ DO NOT LIST MY/OUR NAME(s). We wish to remain anonymous

Signature(s) Date

Please return to: The Legacy Foundation at Shell Point 15010 Shell Point Blvd, Fort Myers, FL 33908