



PLANNED AND LEGACY GIVING

Letter of Intent

In accordance with the ethical framework of the Aga Khan Development Network, a contemporary endeavour of the Ismaili Imam, to realize the social conscience of Islam through institutional action, the Aga Khan Foundation USA invites you and your family to participate in offering an intention of leaving a Planned and Legacy Gift.

PLEASE PROVIDE YOUR CONTACT INFORMATION

IS THIS A JOINT LEGACY GIFT? YES NO

MR MRS MS MISS DR

MR MRS MS MISS DR

NAME

NAME OF SPOUSE

ADDRESS

CITY

STATE

ZIP CODE

PRIMARY PHONE #

E-MAIL

ALTERNATIVE PHONE #

E-MAIL 2

WHAT IS/ARE YOUR BIRTHDAYS?

MONTH

DAY

YEAR

MONTH

DAY

YEAR

I (WE) ACCEPT AKF USA'S INVITATION AND WISH TO BECOME A MEMBER OF THE
1967 LEGACY SOCIETY.

I (WE) ACCEPT MEMBERSHIP BUT WISH TO REMAIN ANONYMOUS IN TERMS
OF PUBLIC RECOGNITION.

The **1967 Legacy Society** is named after a milestone year, when his Highness The Aga Khan founded Aga Khan Foundation as a lasting legacy of his Imam, its membership enables you to receive planned and legacy giving event invitations and publications.

THIS PLANNED GIFT IS MADE IN MEMORY OF OR IN HONOR OF:

NAME

N.B. This document is a confidential and revocable record of each donor's personal expression of charitable intention to Aga Khan Foundation USA and is not a legally binding agreement.



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I/We confirm the following planned gift(s) to AKF USA:

- A BEQUEST TO AKF USA
 - IN MY/OUR WILL IN THE AMOUNT OF \$ _____ / OR AS A _____ % OF NET RESIDUAL
 - IN MY/OUR TRUST IN THE AMOUNT OF \$ _____ / OR AS A _____ % OF NET RESIDUAL
- AKF USA IS THE BENEFICIARY OF
 - MY RETIREMENT ACCOUNT IN THE AMOUNT OF \$ _____ / OR AS A _____ %
 - A LIFE INSURANCE POLICY THAT I/WE OWN IN THE AMOUNT OF \$ _____ / OR AS A _____ %
 - MY DONOR-ADVISED FUND IN THE AMOUNT OF \$ _____ / OR AS A _____ %
- I/WE HAVE ALREADY MADE A DEFERRED GIFT OF LIFE INSURANCE WITH A FACE VALUE OF \$ _____
- I/WE PLAN TO MAKE A FUTURE DEFERRED GIFT OF LIFE INSURANCE WITH A FACE VALUE OF \$ _____
- I/WE INTEND TO MAKE A QUALIFIED CHARITABLE DISTRIBUTION (QCD) FROM RETIREMENT ASSETS IN THE AMOUNT OF \$ _____
- I/WE INTEND TO MAKE A GIFT OF APPRECIATED SECURITIES WITH AN APPROXIMATE VALUE OF \$ _____
- I/WE INTEND TO MAKE A DISTRIBUTION FROM A DONOR-ADVISED FUND OF \$ _____
- OTHER _____

*THE CURRENT TOTAL VALUE OF MY/OUR GIFT(S) IS \$ _____

SIGNATURE DATE

SIGNATURE OF SPOUSE DATE

EXECUTOR/ FAMILY REPRESENTATIVE NAME

PLEASE INDICATE ANY DESIRES YOU MAY HAVE ON WHERE YOU WOULD PREFER TO HAVE YOUR DONATIONS APPLIED. THE FINAL DECISION WILL BE SUBJECT TO THE UNFETTERED PRIVILEGE OF THE CHAIRMAN OF THE BOARD OF AKF USA.



Share Your Story

Please take a moment to tell us about your connection to the Aga Khan Foundation or to other agencies of the Aga Khan Development Network. In particular, we would like to know what motivated you to consider leaving a future gift to the Aga Khan Foundation USA. Your story may inspire future generations to continue the legacy of giving to the Foundation, and thereby create an even greater lasting impact of your generosity.

Please write as much as you wish to share. Thank you!

Should you have any questions or would like to discuss your planned and legacy gift or recognition options, please contact us:

Planned & Legacy Giving
Aga Khan Foundation USA
1825 K Street NW | Suite 901
Washington, DC 20006
202-293-2537, extension 4
legacy.akfusa@akdn.org

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SAMPLE WILL OR TRUST WORDING

RESIDUAL BEQUEST

“I give ____ percent of the residue of my estate to Aga Khan Foundation USA (Internal Revenue Service EIN number 52-1231983) (“AKF USA”) for the purpose of supporting the highest priority needs as determined by AKF USA.”

FIXED BEQUEST

“I give \$____ (USD) (or transfer assets with an equal value) to Aga Khan Foundation USA (Internal Revenue Service EIN Number 52-1231983) (“AKF USA”) for the purpose of supporting the highest priority needs as determined by AKF USA.”

CONTINGENCY BEQUEST

“In the event that (insert name) predeceases me, I give to Aga Khan Foundation USA (Internal Revenue Service EIN Number 52-1231983) (“AKF USA”) his/her bequest or share to Aga Khan Foundation USA for the purpose of supporting the highest priority needs as determined by the Foundation.”

LEGAL NAME AND TAX IDENTIFICATION FOR AKF USA

The exact name you should include when leaving a legacy gift to AKF USA is:

“Aga Khan Foundation USA.”

Internal Revenue Service EIN Number: 52-1231983

For more details on how to leave a legacy gift, please contact us at:

Planned & Legacy Giving

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