



**LETTER OF INTENT FOR AN ESTATE GIFT TO OJAI VALLEY SCHOOL**

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

_____		_____	
NAME		NAME	
_____		_____	
ADDRESS		CITY, STATE, ZIP	
_____		_____	
HOME PHONE	MOBILE	EMAIL	

I/we have made a provision to leave a legacy to Ojai Valley School through my/our:

_____ WILL	_____ RETIREMENT PLAN OR IRA	_____ PROPERTY
_____ LIVING TRUST	_____ LIFE INSURANCE POLICY	_____ OTHER

NOTE: \_\_\_\_\_  
\_\_\_\_\_

I/we wish to inform Ojai Valley School—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, 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.

\_\_\_\_\_ You may publish my/our names in your lists of Yeomans Legacy members as a motivation for others to leave a future gift to benefit Ojai Valley School

\_\_\_\_\_ I/we do not want my/our names published.

_____	_____	_____
DATE	NAME	NAME