



# CAF PLANNED GIVING ▶ LETTER OF INTENT

## LETTER OF INTENT FOR ESTATE GIFT

I/We desire to provide for the future well-being of the Challenged Athletes, Inc. (dba Challenged Athletes Foundation, CAF) through a provision in my/our estate plan. It is my/our understanding that this information is provided to help the Challenged Athletes Foundation in projecting future support and is not considered a binding legal obligation in any fashion, and that any bequest may be changed without further notice.

I/We wish to inform the Challenged Athletes Foundation that the current value of my/our future gift is \$ \_\_\_\_\_

(This amount will be kept confidential by CAF; if your gift is a percentage of your estate, please indicate the approximate value.)

## CHECK ALL THAT APPLY

- I/We plan to include the Challenged Athletes, Inc. as a charitable beneficiary of my will/our wills or my/our revocable living trust.
- I/We plan to name the Challenged Athletes, Inc. as a beneficiary of a Retirement Plan.
- I/We intend to name the Challenged Athletes, Inc. as a beneficiary of a Life Insurance Policy.
- I/We intend to name the Challenged Athletes, Inc. as a beneficiary in a manner not described above. Please specify \_\_\_\_\_

## RECOGNITION

- You may publish my name/our names in your list of Legacy Champions Club members. Please list my name/our names as \_\_\_\_\_
- I/We do not want my name/our names published. My/Our commitment should appear as "Anonymous."

Signature \_\_\_\_\_ Signature \_\_\_\_\_

Printed Name \_\_\_\_\_ Date \_\_\_\_\_ Printed Name \_\_\_\_\_ Date \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Email Address \_\_\_\_\_ Primary Phone \_\_\_\_\_

### This completed document or any letter of intent should be mailed to:

Attn: Virginia Tinley, Chief Executive Director  
Challenged Athletes Foundation 9591 Waples Street, San Diego, CA 92121  
A scan may also be sent to [virginia@challengedathletes.org](mailto:virginia@challengedathletes.org)

## CONTACT US

We encourage you to explore the planned giving options and resources available to you. Contact Virginia at [virginia@challengedathletes.org](mailto:virginia@challengedathletes.org) or 858.210.3513 with questions or request more information at <http://support.challengedathletes.org/pg>



# CAF PLANNED GIVING ► LEGAL INFORMATION

## THANK YOU

Thank you for your consideration of the Challenged Athletes Foundation in your financial and estate plan. When including a bequest provision either in your will or through your trust, always use the full legal name and provide the federal taxpayer identification number.

Our full legal name is “Challenged Athletes, Inc.”  
Our federal taxpayer identification number is 33-0739596.

Your planned gift to the Challenged Athletes Foundation can be in the form of specific amounts of cash or property, or as a percentage of your overall estate. You may also name the Challenged Athletes Foundation to receive the residue, or a portion of the residue, of your estate.

## SUGGESTED LANGUAGE

### Sample Bequest of Remainder of Estate:

I give, devise, and bequeath to Challenged Athletes, Inc. TAX I.D. #33-0739596, a California nonprofit benefit corporation having its principal office at 9591 Waples St., San Diego, CA 92121-2953, all [or state the fraction or percentage] of the rest, residue, and remainder of my estate/trust estate, both real and personal, to be used for the furtherance of its charitable purposes in the discretion and at the direction of the corporation’s board of directors.

### Sample Bequest of Specific Amount:

I give, devise, and bequeath \$ \_\_\_\_\_ to Challenged Athletes, Inc. TAX I.D. #33-0739596, a California nonprofit benefit corporation having its principal office at 9591 Waples St., San Diego, CA 92121-2953, to be used for the furtherance of its charitable purposes in the discretion and at the direction of the corporation’s board of directors.

These are merely suggestions as to content and should be written or adapted by legal counsel to fit the contributor’s individual situation. If you would like to restrict a gift to a specific program or purpose, we would be happy to assist you or your counsel with this language. While it is not necessary, it is helpful to make the Challenged Athletes Foundation aware that we are being named in your will or trust. This way you can be sure your generosity will be executed in the manner you intend.

In addition, we have a special way to recognize donors who have made a planned gift as well as to inspire others to consider support. However, please know that while any information provided will help the Challenged Athletes Foundation in projecting future support, it is not considered a binding legal obligation in any fashion and that any bequest may be changed without further notice.

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CAF is a 501(c)(3) non-profit, Tax ID #33-0739596