Date

Name  
Address  
Address

Dear <formal greeting>:

I hope this finds you well and looking forward to your summer.

I want you to know about an easy way of giving to <your org>: Using your revocable living trust.

You’ve been making your gifts to us through your revocable trust, and we’re grateful to have you as a partner in <what’s your work?>. I thank you.

You can go one step further and make <your org> a remainder beneficiary of your trust.

Of course, family comes first. That’s always true. After loved ones, there’s the possibility of carving out three or five or ten percent for <your org>.

There’s no lifetime cost and your gift would come to us at the same time your other trust beneficiaries receive their shares. This is a wonderful way to show your long-term support of <your org>’s vision for . . .

If you’re ready to make <your org> part of your trust, share this with your attorney. Our federal tax ID is XX-XXXXXXX and our legal name is YYYYYY.

If you’d like to talk about the possibility of <your org> in your revocable living trust, I hope you’ll reach out to me at . . ..

I thank you for all you do for <your org>, and I thank you for considering <your org> as part of your trust.

Sincerely,