## **Anonymous Confidential Planned Gift Confirmation from Financial Planner**

To: Name of staff contact
From: Name of financial planner
This is to inform you that on or about, a client took the required legal and financial steps to make a provision for an estate gift to, with said gift/bequest to be transferred upon my client's death.
Client's Birth date/ Spouse's Birth date/
Approximate value of provision \$
Gift designated to (if known)
Other pertinent information
I am transmitting this information to you subject to our mutual understanding thecharity wand its staff/agents will hold this information in strictest confidence, and will use this information for no other purpose than to assist the Foundation in estimating the long-term expectations of its planned giving program.
It is further understood that nothing in this statement precludes the possibility the client, with or without my knowledge, will amend, withdraw or otherwise alter the gift of bequest referred to herein.
Date
SignedTitle
Firm