

# Letter Of Intent for Estate Gift

We appreciate your interest in providing a charitable estate gift to RMI in support of our work to transform the global energy system and secure a prosperous, resilient, clean energy future for all.

Please take a few minutes to let us know your intentions by filling out this form. This form is not a contract and we understand that this gift may be changed in the future.

## RMI LEGACY SOCIETY

To celebrate your generosity, you will be a part of RMI's Legacy Society, a group of donors who have thoughtfully included RMI in their estate plans. As such, you will receive invitations to meet and hear from RMI's leadership.

May we recognize you publicly by name in our Annual Report under RMI's Legacy Society?

☐ Yes\*  
\*Please list your name/s on the form as you'd like to be recognized.

☐ No, please keep my gift anonymous.

☐ I'd like to discuss

## RMI Legacy Society

msalamon@rmi.org  
rmi.org/legacy

2490 Junction Place, Suite 200  
Boulder, CO 80301  
303-245-1003

NAME/S (Please include your spouse's name if this is a joint gift)

ADDRESS

CITY

STATE

ZIP CODE

PHONE

EMAIL

ATTORNEY OR REPRESENTATIVE HANDING MY/OUR ESTATE

- ☐ This is a new gift intention  
☐ This is an updated gift intention

## About Your Gift

We appreciate anything you are willing to share about your legacy gift intentions and their approximate current value.

- ☐ Will: \$ \_\_\_\_\_  
☐ Revocable Living Trust: \$ \_\_\_\_\_  
☐ Retirement Plan/IRA: \$ \_\_\_\_\_ Plan Administrator \_\_\_\_\_  
☐ Insurance Policy: \$ \_\_\_\_\_ Plan Administrator \_\_\_\_\_  
☐ DAF Assets: \$ \_\_\_\_\_ DAF Administrator \_\_\_\_\_

- ☐ Charitable Remainder Trust: \$ \_\_\_\_\_  
☐ Real Estate: \$ \_\_\_\_\_  
☐ Other asset(s): \$ \_\_\_\_\_

☐ This is a contingent gift

A contingent gift comes to RMI only if other named beneficiaries do not survive you.

## Any other details about your gift that you would like to provide?

This form is for informational purposes only and is not legally binding for you, your estate, personal representatives, or heirs. Your intentions remain revocable, and we understand that the gift is subject to change depending on personal circumstances. Information you provide will remain confidential. We kindly ask that you notify RMI's Development team if you modify your plans.

Date

Signature

Spouse's Signature (if applicable)