



## Estate Gift Intention Form

Thank you for your intention to include Breakthrough Central Texas in your will or estate plan. It is a simple and thoughtful way to create a lasting impact for Central Texas children, with generational ripple effects that only education can provide.

Kindly complete and return this form with as much detail as you are willing to share. This form does not create a binding obligation. Any information about your gift will remain strictly confidential and will enable us to recognize your generosity in a manner that meets your needs and expectations.

### Personal Information

\_\_\_\_\_  
Name

\_\_\_\_\_  
Spouse Name (if joint gift)

\_\_\_\_\_  
Address

\_\_\_\_\_  
City, State, ZIP

\_\_\_\_\_  
Mobile Phone

\_\_\_\_\_  
Email

### Gift Information

I/we have provided a gift to Breakthrough as set forth in my/our *(check all that apply)*:

Will or Trust

Life Insurance Policy

Retirement Account/Other Beneficiary Designation  
(e.g. 401(k), IRA, brokerage account, etc.)

Other *(please describe)*  
\_\_\_\_\_

If applicable, my gift names Breakthrough as:  Primary Beneficiary  Contingent Beneficiary

Describe contingency: \_\_\_\_\_

The intended, approximate amount of my estate gift is \$\_\_\_\_\_ or \_\_\_\_\_% of the asset(s) indicated above. If a percentage is given, the current estimated value of the percent in today's dollars is \$\_\_\_\_\_.

I/we wish to direct this estate gift to Breakthrough for general support, unless otherwise specified here:  
\_\_\_\_\_

### Recognition

In recognition lists, I/we would like to appear as follows:  
\_\_\_\_\_

I/we wish to remain anonymous.

## Estate Contact Information (optional)

Although optional, the following information is helpful to ensure your wishes are carried out as envisioned:

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Executor/Trustee Name

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Address

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City, State, ZIP

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Phone

---

Email

I wish for Breakthrough to report on the impact of my gift to the following person:

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Name

---

Relation

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Address

---

City, State, ZIP

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Mobile Phone

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Email

## Message for Future Generations (optional)

Your legacy gift will advance educational equity and help Breakthrough realize our vision that all children have the opportunity to realize their potential through the life-changing power of a college education. What message would like to those who will benefit from your generosity?

I authorize Breakthrough to use my message for marketing purposes.

I/we understand this Estate Gift Intention Form is not legally binding but will allow Breakthrough to understand my/our gift intention and recognize my/our future support. I/we agree to inform Breakthrough should these plans change or should the dollar value of the estate potential donation significantly increase or decrease. Breakthrough understands that my/our gift intention is revocable.

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Signature

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Date

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Signature (if joint gift)

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Date

*As with any decision involving your assets, we urge you to seek the advice of your professional counsel when considering a gift to Breakthrough and encourage you to discuss your legacy intention with your loved ones.*

### Helpful Information for Your Advisors

Breakthrough Central Texas is a 501(c)(3) not-for-profit corporation established in the State of Texas on February 14, 2001.

**Legal Name:** Breakthrough (d.b.a. Breakthrough Central Texas) | **Tax ID:** 74-2991346

**Address:** 1050 East 11<sup>th</sup> Street, Suite 350, Austin, TX 78702

#### **For questions or more information, please contact:**

Holly Wissmann, Director of Philanthropy: [holly@breakthroughctx.org](mailto:holly@breakthroughctx.org) | 512.961.5256

#### **Please return via mail or email to:**

Breakthrough Central Texas  
Attn: Development  
1050 East 11<sup>th</sup> Street, Suite 350  
Austin, Texas 78702  
[holly@breakthroughctx.org](mailto:holly@breakthroughctx.org)

# *Thank you!*