

Charitable Bequest Notification

Date: [Insert Date]

[Advisor's Name]

[Advisor's Firm]

[Address]

[City, State, Zip Code]

Dear [Advisor's Name],

I hope this letter finds you well. I am writing to formally notify you of a charitable bequest I have included in my estate plan. In my will, I have designated a portion of my assets to bequeath to [Charity Name], a nonprofit organization dedicated to [brief description of the charity's mission].

The details of the bequest are as follows:

- Beneficiary: [Charity Name]
- Bequest Amount: [specific amount or percentage]
- Purpose of the Bequest: [specific purpose if any]

I would appreciate your guidance on how to ensure that this provision is upheld and managed according to my wishes. If you require any further information or documentation, please do not hesitate to contact me.

Thank you for your continued support and assistance in managing my estate planning needs.

Sincerely,

[Your Name]

[Your Contact Information]