



CONFIDENTIAL STATEMENT OF ESTATE PLAN AND LEGACY GIFT

I/We desire to provide for the future of Mission Doctors Association (MDA) through a provision in my/our estate plans. I/We understand that these plans can be revoked or modified by me/us at any time.

My/Our provision for MDA is through:

- Will or Living Trust Retirement Plan or IRA Remainder Interest in Real Estate
- Charitable Trust Life Insurance Policy
- Other

The **estimated current value** of my/our future gift is \$

I/We understand that my/our estate is not legally bound by this statement and that I/we may choose to increase, decrease, or revoke this bequest at any time, at my/our sole discretion.

MDA will receive this gift after: My life The later of two lives

May MDA publish your name(s), without dollar amounts, in Mission Doctors Legacy Society member listings?

I/We prefer to remain anonymous

Please list my/our name(s) as follows:

CONTACT INFORMATION

Name	Name
Phone	DOB
Email	Phone
Address	DOB
Signature	Signature
Date	Date

I have informed my family members about my gift

A copy of your documentation relating to your MDA gift will help MDA ensure your objectives can be met (e.g., will or trust excerpt, beneficiary designation form). Also please attach additional sheets if needed to further describe your gift and wishes.

Return to: Mission Doctors Association
 6102 South Victoria Ave., Los Angeles, CA 90043
 213-368-1872
Tax ID: 95-6110132 **Legal Name:** Mission Doctors Association

Elise Frederick
 213-368-1875
 efrederick@MissionDoctors.org

Thank you for your generosity and dedication to MDA.
Your intention today helps MDA plan for its future.

Sample MDA Bequest Language for Your Will or Trust

I give [INSERT DOLLAR AMOUNT, PERCENTAGE OF ESTATE, PERCENTAGE OF RESIDUE OF ESTATE, OR DESCRIPTION OF PROPERTY], to Mission Doctors Association, 6102 South Victoria Ave., Los Angeles, CA 90043, Tax ID 95-6110132, to be used for [INSERT GENERAL PURPOSES OR NAME OF MDA PROGRAM]. If circumstances arise in the future that, in the judgment of Mission Doctors Association, make the purpose of the gift impossible or impractical, then Mission Doctors Association will modify the gift to appropriately recognize my interests in coordination with the organizations priorities.

How to Minimize Legal Fees & Maintain Flexibility with MDA Bequests

If you are undecided about which programs to support at MDA, simply leave a bequest in your will or trust to Mission Doctors Association and send MDA Gift Planning a signed Letter of Instruction describing how we should direct any assets MDA may receive from your estate. By using a Letter of Instruction, there's no need to incur legal fees to amend your will or trust with respect to MDA bequests.

We will acknowledge receipt of your Letter of Instruction and work with you to ensure that your wishes can be fulfilled. You may update or revoke your Letter of Instruction at any time or change your legal documents with regards to MDA. Your Letter of Instruction is not binding on your estate, but if MDA receives assets from your estate, MDA will honor the Letter of Instruction, provided it is not superseded by new legal documents with regards to MDA.

How to Prepare a Letter of Instruction

A Letter of Instruction can be as short as one sentence or as comprehensive as an Endowment Agreement. For example, a signed, dated Letter of Instruction can state in one sentence that your gift to MDA from your (will/trust/retirement plan/insurance policy) is for a particular program or named fund in honor or memory of a loved one.

How to Use Beneficiary Designations & IRA Charitable Rollovers to Support Specific Areas at MDA

Beneficiary Designations and IRA Charitable Rollovers are payable to Mission Doctors Association, and do not designate areas at MDA. To support specific areas, please send us a Letter of Instruction. Note that an email will suffice to direct IRA Charitable Rollovers to specific areas. Email can be sent to efrederick@missiondoctors.org

Why Sharing Your Beneficiary Designations & Excerpts of Your Will or Trust with MDA Protects You

Financial institutions and insurance companies may not be obligated to inform beneficiaries of a death or may unduly delay in doing so; also these firms often merge over time. If you provide copies of your beneficiary designations and excerpts of your will or trust, we can most ably facilitate your MDA legacy.