



A Gift That Leads Someone Home

Intent to Give

Thank you for your incredible stewardship and desire to support OurCalling. This form covers two kinds of gifts — a legacy gift (bequests and beneficiary designations) and an asset-based gift made through our Single Charity Fund at the National Christian Foundation (NCF).

Complete the section(s) that apply:

Name _____ Spouse Name (if this is a joint gift) _____

Email Address _____ Phone Number _____

Mailing Address _____ City/State/Zip _____

Date of Birth(s) _____

Are you working with a financial advisor, CPA, or estate attorney on this gift?

☐ Yes — please share their name/contact below if you'd like us to coordinate with them

Advisor Name _____ Phone Number: _____

☐ No

Select Your Gift Type

Check all that apply

A. Legacy Gift (Bequests & Beneficiary Designations)

☐ I have included a bequest for OurCalling in my will or living trust.

☐ I have named OurCalling as a beneficiary of my retirement plan (IRA, 401(k), 403(b), etc.)

☐ I have named OurCalling as a beneficiary of my life insurance policy.

☐ I have named OurCalling as a beneficiary of a bank or brokerage account.

☐ I have named OurCalling as a beneficiary of a charitable trust.

☐ I am interested in making a planned gift and would like someone to contact me to discuss my options.

☐ Other: _____

B. Asset-Based Gift (via OurCalling's Single Charity Fund at NCF)

☐ Appreciated Stocks

☐ Privately-Held Business Shares

*If you selected Privately-Held Business Shares — is there currently an active or pending contract, Letter of Intent (LOI), or binding purchase agreement to sell this asset?

☐ Yes, an agreement is already signed.

☐ An agreement is pending/under negotiation, but not yet signed.

☐ No, there is no active sale process.

☐ Not applicable to my asset type.

☐ IRA Qualified Charitable Distribution (QCD)

☐ Real Estate / Property

☐ Donor-Advised Fund

☐ Other: _____

Description of Gift _____

For more information or to schedule a meeting to discuss, please email development@ourcalling.org

**Please mail this completed form and accompanying documentation, or
bring it with you when you meet with one of our team members.**

Mailing address: OurCalling, 1702 S. Cesar Chavez Blvd., Dallas, TX 75215

Phone: 214-444-8796 • Federal Tax ID: 26-4430860

This form is a statement of your current intentions and is not legally binding. Your estate plans remain fully under your control and can be modified at any time.