



Example:
Charitable Endowment Insurance Policy
Letter of Instruction

TO: Alive Hospice, Inc.
1718 Patterson Street
Nashville, TN 37203

FROM: _____ (donor)

DATE: _____

On (date) , I purchased a Life Insurance Policy (# _____) from the
_____ (insurance company) in the face amount of \$ _____.

The nonprofit organization Alive Hospice, Inc. is the owner and beneficiary of that policy. I am the insured.

This Letter of Instruction is my directive as to the division of the net cash value of death benefits which you may receive from the above named policy. This letter supersedes and replaces any Letter of Instruction which I may have previously given to you concerning this policy.

I wish that the proceeds be distributed to endow the following:

_____ % to Alive Hospice, Inc. for greatest need
_____ % to _____
_____ % to _____
_____ % to _____

While it is my wish that the insurance proceeds be distributed as shown above, I hereby give Alive Hospice, Inc. the final discretion as to its ultimate distribution. If any of the above charities is no longer in existence or is not a qualified charity at the time of distribution, it is my wish that the portion of the proceeds designated for such disqualified charity be divided as follows:

_____ Prorated to the other named charities for which a gift was indicated.
_____ Given in its entirety to _____.
_____ Divided equally between the following charities:

Signed this _____ day of _____, 20____.

_____ (witness) _____ (donor)