

# LETTER OF INTENT

*To insure that Louisa May Alcott's Orchard House is able to fulfill its mission of public education and historic preservation for the next hundred years and beyond, I/we would like to:*

- Make a gift in full with the enclosed check***
- Pledge a gift in the amount of \$ \_\_\_\_\_ over a period of \_\_\_\_\_ years***
- Structure a gift at this time:***  
Enclosed is an initial payment of \$ \_\_\_\_\_. The balance of \$ \_\_\_\_\_ will be made over \_\_\_\_\_ year(s) beginning in \_\_\_\_\_ (month/year) in the following installments (please check one):
- Annually       Semi-Annually       Quarterly       Monthly
- Give a gift of securities:***  
Name of Securities \_\_\_\_\_ Number of Shares \_\_\_\_\_  
Estimated Transfer Date \_\_\_\_\_ (see Transfer instructions on following page)
- Permission is given to publish my/our names in gift acknowledgement lists. *Please indicate how your name(s) should appear:* \_\_\_\_\_
- I/We wish to remain anonymous and prefer not to be identified in any Campaign-related or acknowledgement materials.

*In signing this form, it is my/our serious intention to fulfill the foregoing plan in support of the Second Century Campaign. This intention is subject to modification if conditions should warrant, and I/we may also increase the gift at any time. This intent does not obligate my family or heirs, although they may desire to complete the payment knowing of my interest. All donations made in support of the Second Century Campaign are tax-deductible to the fullest extent permitted by law.*

Donor (print name): \_\_\_\_\_ Signature: \_\_\_\_\_

Donor (print name): \_\_\_\_\_ Signature: \_\_\_\_\_

Mailing address: \_\_\_\_\_

Best Phone: \_\_\_\_\_ Date: \_\_\_\_\_

*All pledges to this Campaign are held in confidence. Please return this Letter of Intent to:*

**Jan Turnquist, Executive Director**  
**Louisa May Alcott's Orchard House PO Box 343 Concord, MA 01742-0343**

## *Instructions for Gifting Securities*

Our Stock Transfer Agent is Mr. Robert A. O'Neil Jr., CFA and Principal at *Birch Hill Investment Advisors, LLC* in Boston. If you have any questions prior to or at any time during your transfer, please do not hesitate to contact him.

The following information should be helpful if you intend to gift securities:

**Transfer of Securities to: ENDOWMENT FUND**

**For DTC Eligible Securities: CHARLES SCHWAB & CO.**

*(If securities are not DTC Eligible, please contact Mr. O'Neil)*

**DTC: CLEARING 0164, CODE 40**

**Account Name: LOUISA MAY ALCOTT'S ORCHARD HOUSE, INC.  
ENDOWMENT FUND**

**Account Number: 5487-5380**

**Tax ID Number Associated with the Account: 04-2126592**

Kindly coordinate all details with Mr. O'Neil, who may be reached at:

*Birch Hill Investment Advisors LLC*  
One International Place, Suite 770  
Boston, MA 02110  
p 617.502.8302  
f 617.502.8310  
roneil@BirchHillAdvisors.com