

# Legacy Society: Planned Giving Form

## Donor Information

Full Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Email Address: \_\_\_\_\_

## Gift Information (Confidential & Non-binding)

I/we have included **Junior Achievement of San Diego County (EIN 95-1727087)** in my/our estate plan through the following type of gift:

- |  |  |
|--|--|
| <input type="checkbox"/> Will or Living Trust  | <input type="checkbox"/> Retirement Plan Beneficiary (e.g., IRA, 401(k)) |
| <input type="checkbox"/> Life Insurance Policy | <input type="checkbox"/> Charitable Remainder Trust                      |
| <input type="checkbox"/> Donor-Advised Fund    | <input type="checkbox"/> Other: _____                                    |

Estimated Gift Value (if known): \$ \_\_\_\_\_

☐ I prefer not to disclose the estimated value at this time

## Recognition

☐ You may include my/our name(s) in your legacy society or recognition materials.

Please list as: \_\_\_\_\_

☐ I/we wish to remain anonymous.

## Documentation (Optional)

☐ I have enclosed a copy of the relevant page of my estate plan or beneficiary designation form.

☐ I intend to share documentation in the future.

## Signature

I/we understand that this form is not legally binding and is for informational purposes only.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Spouse/Partner Signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

## Contact

If you have any questions or would like to discuss your gift, please contact:

Jessica R. Woodyard | *Vice President of Development*

O: 619.906.4902 | C: 847.309.8085 | [jwoodyard@jasandiego.org](mailto:jwoodyard@jasandiego.org)