

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, Inc. (EIN 95-1727087)** in my/our estate plan through the following type of gift:

- | | |
|--|--|
| ☐ Will or Living Trust | ☐ Retirement Plan Beneficiary (e.g., IRA, 401(k)) |
| ☐ Life Insurance Policy | ☐ Charitable Remainder Trust |
| ☐ Donor-Advised Fund | ☐ 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*

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