

Yes, I believe in the mission of [organization].

- Please give me more information about legacy gifts.
As I consider making a gift, my priorities are: (Check all that apply.)
- Honor someone special with a tribute gift
 - Give back to [organization]
 - Make a difference for future generations
 - Maximize my tax savings
 - Protect my assets for myself and/or my heirs
 - Make a gift that benefits [organization] as well as my family
 - Other:

- Please send me a free, no-obligation illustration to show what my payments would be if I were to make an income-producing gift to [organization].

Date of Birth _____

Spouse's Date of Birth _____

I am considering a gift in the amount of \$ _____

I am interested in contributing [] Cash [] Stock [] Real property

- I have already made the following gift(s) to [organization] in my estate plans.
- Gift in my will : _____ % or \$ _____
 - Beneficiary of my life insurance policy: _____ % or \$ _____
 - Beneficiary of my retirement account: _____ % or \$ _____
 - Charitable Gift Annuity
 - Real Estate
 - Other: _____

- You may contact me to confirm that your records match mine and give me information about membership to the [legacy society].

- Yes, you can share my legacy giving story to help inspire others to give.

Please contact Jane Doe at 555-555-5555 for more information.
Or just email us at Success@PlannedGiving.com



Your Organization Name
12345 Main Street, Suite 22
Anytown, ST USA 00000

555-555-5555
Success@PlannedGiving.com

How can we help you plan your best legacy gift?

I would like to: Make a tribute gift to (Organization Name) in my will.

- Make (Organization Name) the beneficiary of a retirement fund.
- Make (Organization Name) the beneficiary of a life insurance policy.
- Make a charitable trust and naming (Organization Name) as a beneficiary.
- Make a legacy gift to (Organization Name) not listed here.

My legacy gift is in the amount of: \$_____ or _____%

I prefer not to disclose the amount of my legacy gift, but I'm excited to know \$_____ will be donated to (Organization Name) as part of my gift.

I'm interested. Tell me more.

- I would like to receive a personalized illustration to see what my payments and tax savings would be if I were to make "a gift that pays me back."
- I'm interested in making a legacy gift but I have questions.

I've already made a legacy gift to [organization].

I have already made the following gift to [organization] in my estate plans.

[] Bequest [] Beneficiary of my life insurance policy [] Beneficiary of my IRA
[] Charitable Gift Annuity [] Real Estate [] Other: _____

Please share the dollar amount or percentage of your gift and let us know if there is a particular program you would like to support:

You may contact me to confirm that your records match mine and give me information about membership to the [legacy society].

You may share my legacy giving story to help inspire others to give.

I do not have an estate plan in place yet but would like to learn more about how putting a good estate plan in place can benefit my family and [organization].

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