

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

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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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