***Yes, I believe in the mission of [YOUR NONPROFIT].***

**☐ 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 personalized, no-obligation illustration to show what my earnings would be if I were to make an income-producing gift to [YOUR NONPROFIT].**

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 estate

**☐ 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.

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

Name(s) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

City \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ State \_\_\_\_\_\_\_\_ Zip \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone number(s) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Preferred method(s) of contact: ☐ Phone ☐ Email ☐ Mail

Best day/time to reach you: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_