



### Planned Gift Notification

Thank you for informing us that you have included Sunnyvale Community Services (SCS) in your estate plans. With this disclosure, we are pleased to welcome you as a member of the Leslie Lawton Legacy Society.

An estate plan is a highly personal matter. Therefore, only those who give their permission will have their names published in a listing of Legacy Society members.

Realizing that my example may encourage others to include SCS in their estate plans, I hereby give permission for my name to be recognized.

Please list my membership in the Leslie Lawton Legacy Society as:

\_\_\_\_\_

Please do not publish my name in a listing. I wish to remain anonymous.

\_\_\_\_\_

#### Donor Information

Full Name \_\_\_\_\_ Birth Date \_\_\_\_\_

Spouse's Name \_\_\_\_\_ Birth Date \_\_\_\_\_

Address \_\_\_\_\_ Telephone \_\_\_\_\_

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

Email \_\_\_\_\_

First involvement with SCS: Year \_\_\_\_\_

Briefly describe your involvement with SCS: \_\_\_\_\_

\_\_\_\_\_

This section is entirely optional and always confidential. Although it is in no way binding, this information is helpful to us in planning for SCS's future and in ensuring your wishes are fulfilled.

My estate plan provides for SCS in the following way. Please attach a copy of the relevant provision, if you wish too.

I have made an outright gift or a pledge to SCS.

Will or Trust: \_\_\_\_\_ %, \$ \_\_\_\_\_, or \_\_\_\_\_ as a contingency beneficiary

Beneficiary of my IRA \_\_\_\_\_ %, \$ \_\_\_\_\_

Life Insurance \$ \_\_\_\_\_

Real Estate

Other

Charitable Trust

Charitable Gift Annuity

Donor-Advised Fund (DAF)

