

Join The Sonoma Valley Legacy Circle

A GIFT OF HOPE

Confidential Information CONFIRMATION OF YOUR PLANNED GIFT

Name(s): _____
Address: _____
Telephone: _____ Email: _____

Ways to Give to the Sonoma Valley Fund and Other Nonprofits (Please check ways that may be considered):

- Will Retirement Plan Assets (IRA, 401K, etc.) Life Insurance Policy
 Living Trust (Avoids Probate) Charitable Remainder Trust Charitable Lead Trust
 Other (prefer to discuss in person) _____

When considering ways to make a future gift we recommend consulting with your attorney or other financial advisor. A trained professional can offer advice about the role of charitable giving in your will or estate plan; the tax advantages to the donor and his/her heirs can be beneficial. If you do not work with a professional at present, you may request a one-hour free consultation with a Sonoma Valley attorney or financial advisor to start your endowment giving plans. For a list of qualified professionals, please go to www.sonomavalleyfund.org/professional_advisors.

Please Indicate Your Interest

_____ I/We have made provisions for a gift of a percent of my/our estate or a specific amount to (please provide a list of the non-profit beneficiaries):

I/We request that this gift/these gifts ultimately be used for:

- Endowment support of selected nonprofits
 Other purposes: _____

Recognition Preferences

- I/We authorize the Sonoma Valley Fund to include my/our name(s) as a Sonoma Valley Legacy Circle Member/s and in publications. *or*
 I/We do *not* wish to have our gift recognized publicly. Please do *not* include my/our name(s) in any publications.
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Signatures (I/we understand that this form is for planning purposes only and is non-binding and revocable)

_____ Donor Signature	_____ Date
_____ Donor Signature	_____ Date

We ask for a copy of this form or a letter stating that you have made an endowment gift so that we may include you in our annual report, Sonoma Valley Fund, Box G, Sonoma, CA 95476, Attn: President