

Sonoma Valley Fund

AN ENDOWMENT IS A GIFT OF HOPE

Confidential Information ABOUT YOUR ENDOWMENT GIFT PLAN

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

Ways to Give to the Sonoma Valley Fund and Other Nonprofits:

- 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) _____

Please check ways that may be considered.

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 estate planning; 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 ask a SVF Board member.

I/we understand that this form is for planning purposes only and is non-binding and revocable

Please Indicate Your Interest

_____ I/We have made provisions for a gift of a percent of my/our estate or a specific amount to:
optional _____.

_____ I/We are considering making a future gift of a percent of my/our estate or a specific amount to:
optional _____.

I/We request that this gift 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 Legacy 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 are optional:

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