



Golden Eagle Legacy Club Invitation & Planned Giving Form

CONFIDENTIAL

Thank you for notifying us that you have included the San Diego Audubon Society in your estate plans. Your lasting gift will help ensure the protection of San Diego's birds, wildlife, and native habitat.

As a legacy donor, we warmly invite you to join the Golden Eagle Legacy Club. Members of this Club are invited to periodic special events that provide access to insider information about upcoming initiatives and recent successes. Membership also can benefit our organization by inspiring others to consider planned gifts. Inclusion in the Club is without obligation.

Please let us know your preferences by checking one of the boxes below:

- List my/our name(s) as member(s) in the Golden Eagle Legacy Club as I/we have printed them here.

- List me/us in the Golden Eagle Legacy Club as "Anonymous."
- I/we decline membership in the Golden Eagle Legacy Club.

About my future gift:

The following questions are optional. We have included these questions to help us ensure that your wishes are honored. This information will also help our Board of Directors to better plan for the future.

I/we have made the following charitable gift plans to The San Diego Audubon Society in my/our: (Please check all that apply).

- Will (dated _____)
- Living trust (dated _____)
- Life insurance policy
- IRA or other pension plan
- Real estate
- Charitable trust
- Trust created in my will

- Other (please describe) _____

The following two questions are also optional. Answering the question regarding the current value of your gift will help the Board of Directors in long-range planning.

Description of gift and any specific instructions on how it is to be used:

Approximate Current Value of Gift _____

All information about your plans will be retained in the Society's confidential files. Please note that this is NOT a legal document or binding pledge.

Date _____

Donor's Signature(s) _____

Donor Birthdate(s) _____

Address _____

Phone _____ E-mail _____

Thank you and welcome to the San Diego Audubon Society's Golden Eagle Legacy Club!

The San Diego Audubon Society
Tax ID Number: 95-6100273

If you have questions about this form or would like to discuss your plans, we would be glad to assist you. Please call Travis Kemnitz, Executive Director, at (858) 273-7800 x 102. We recommend you consult an estate attorney and/or financial planner when making your estate plans.

Please return this form to: Travis Kemnitz, Executive Director, San Diego Audubon Society, 4010 Morena Blvd. Ste. 100, San Diego, CA 92117.