

# Sonoran Desert Center for Spiritual Living

**Planned Gift Notification:** To recognize your bequest to the SDCSL, we simply need written notice of your intention. Your information is kept confidential and we will only recognize your legacy gift with your approval.

## Donor Information

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

Address: \_\_\_\_\_

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

Telephone Contact Number(s):

House (\_\_\_\_) \_\_\_\_\_ Mobile1 (\_\_\_\_) \_\_\_\_\_ Mobile2 (\_\_\_\_) \_\_\_\_\_

Email(s): \_\_\_\_\_

## SDCSL Legacy Society Information

SDCSL is pleased to recognize you as a member of the SDCSL Legacy Society in general reporting, newsletters, and more. Please indicate your recognition preference by checking one of the following:

- Please list my/ our name(s) as (If different from above): \_\_\_\_\_
- I/We wish to be anonymous – do not share my information.

**Gift Information:** SDCSL is named as a beneficiary of (check all that apply):

- Bequest in will
- Beneficiary of life insurance policy
- Provision in living Trust
- Payable on death (POD) Designation Bank Account, savings, CD, etc.
- Beneficiary of retirement account – traditional IRA, 401(k), 403(b)
- Other: \_\_\_\_\_
- Charitable Gift Annuity

**Contact Information** of any organization(s), Personal Representative(s), and or Successor Trustees who may contact us upon your demise regarding the bequest(s) above. Need more room? Feel free to add additional attachments.

Name/Organization: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Telephone Contact Number(s): \_\_\_\_\_

Email: Any Additional Notes: \_\_\_\_\_

Legacy Society Member Signature 1\*: \_\_\_\_\_ Date: \_\_\_\_\_

Legacy Society Member Signature 2\* (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

\*By signing you affirm that all arrangements for the gift(s) above have been completed. This form is non-binding and does not constitute a legal promise of any future donation to SDCSL. We understand that most gift are revocable and that your estate plans may change.

## **Instructions:**

Ensure all gift arrangements have been finalized, then complete the first page, print, sign and return it with any optional supporting documents to:

Sonoran Desert Center for Spiritual Living

Address: The Sonoran Center, 2050 Territory Lane, Amado, AZ 84645

Mailing Address: PO Box 1598, Green Valley, AZ 85622

Phone: 520-625-6100

IRS Tax ID: xxxxxxxxxxxx SDCSL is a 501(c)(3) non-profit organization.

Or, you may submit the completed form and any supporting documents as attachments via email to:

We can't provide tax or legal advice, but we can answer many questions relating to various types of planned gifts and which type might work best for you.