

# Confidential Legacy Intention Form

Audubon's *Elevate* campaign will transform our ability to protect birds and the places they need for generations to come.

**Your support helps make our vision a reality.**

Bequests and other legacy gifts from generous supporters have been a vital source of funding for Audubon for more than 100 years. While much of our attention is focused on current and pressing needs, these future gifts will ensure our long-term sustainability and success.

Please complete this form to notify (or update) Audubon of your generous legacy intention and to be included in our *Elevate* campaign.

NAME(S)

BIRTHDATE(S) MM/DD/YYYY

<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

ADDRESS

Preferred method of contact:

PHONE

EMAIL

<input type="text"/>	<input type="text"/>
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**Your gift may inspire others to give, and we hope you are willing to be acknowledged in Audubon publications with other members of the Grinnell Legacy Society.**

How would you like to be listed in Audubon's Annual Report?

PLEASE LIST MY NAME AS:

MY GIFT IS  IN HONOR OF

IN MEMORY OF

I PREFER TO REMAIN ANONYMOUS.

Which benefits of Grinnell Legacy Society membership would you like to receive?

ANNUAL REPORT

AUDUBON ENGAGEMENT CALENDAR

INVITATIONS TO EVENTS AND TRIPS

FOR GIFTS THAT WILL TAKE EFFECT AFTER YOUR LIFETIME, PLEASE USE THE FOLLOWING LANGUAGE:

*I bequeath \_\_\_\_\_ (dollar amount or % of estate) to the National Audubon Society, Inc., a not-for-profit organization, with its principal offices located at 225 Varick Street, 7th Floor, New York, NY 10014. Tax ID # 13-1624102.*

## Additional Information About Your Gift

We need the details of your gift in order to count it toward the *Elevate* campaign. Your information is confidential, for our records only. This form is not legally binding upon you or your estate as to the ultimate receipt or value of any future gift.

I/We have included in my/our estate plan a donation to Audubon for:

THE NATIONAL AUDUBON SOCIETY'S GREATEST NEEDS.

WORK IN A SPECIFIC STATE, AUDUBON CENTER, OR PROGRAM:

### Type of Gift

Check all that apply and please estimate the value of each gift in today's dollars:

GIFT FROM MY WILL OR LIVING TRUST      EST. VALUE \$

RETIREMENT PLAN/IRA BENEFICIARY      EST. VALUE \$

CHARITABLE REMAINDER TRUST      EST. VALUE \$

LIFE INSURANCE POLICY      EST. VALUE \$

OTHER ASSET(S):

A **contingent gift** comes to Audubon only if the other named beneficiaries do not survive you. Is your gift contingent?

NO       YES (PLEASE EXPLAIN)

Audubon wishes to assure you that your statement of intention does not constitute a legal obligation and will not be legally binding in any way on you, your heirs, or your estate. Further, Audubon understands that the size of your future gift may be different from the amount estimated above.

SIGNATURE(S)

DATE

*You may also type your name(s) in the box above to sign.*

### Please return this form to:

Office of Gift Planning,  
225 Varick St., 7th Floor,  
New York, NY 10014

Or via email to  
plannedgifts@audubon.org

