



# SONOMA ECOLOGY CENTER

Beautiful. Sustainable. Sonoma

## Legacy Giving Confidential Enrollment Form

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

Mailing Address \_\_\_\_\_

City/State/ZIP Code \_\_\_\_\_ Daytime Phone \_\_\_\_\_ Evening Phone \_\_\_\_\_

Email \_\_\_\_\_

### Relationship with Sonoma Ecology Center

- Community Member
- Donor
- Board of Directors (current or past)
- Staff (current or past)

### Gift Information

- |                                                    |                                                                              |
|----------------------------------------------------|------------------------------------------------------------------------------|
| <input type="checkbox"/> Client                    | <input type="checkbox"/> Gift of Residence or Farm with Retained Life Estate |
| <input type="checkbox"/> Donor                     | <input type="checkbox"/> Charitable Remainder Annuity Trust                  |
| <input type="checkbox"/> Volunteer                 | <input type="checkbox"/> Charitable remainder Unitrust                       |
| <input type="checkbox"/> Friend                    | <input type="checkbox"/> Charitable Lead Trust                               |
| <input type="checkbox"/> Bequest (or living trust) | <input type="checkbox"/> IRA/Retirement Plan Beneficiary                     |
| <input type="checkbox"/> Dollar Amount             | <input type="checkbox"/> Residuary Bequest                                   |
| <input type="checkbox"/> Stock or Property         | <input type="checkbox"/> Pooled Income Fund                                  |
| <input type="checkbox"/> Percentage Bequest        |                                                                              |
| <input type="checkbox"/> Life Insurance Policy     |                                                                              |
| <input type="checkbox"/> Charitable Gift Annuity   |                                                                              |

Please indicate the approximate current market value of the planned gift named above \$\_\_\_\_\_ (optional, will be treated as confidential).

The gift is

- Unrestricted
- Restricted as follows
  - I wish to remain anonymous
  - Other

Signature \_\_\_\_\_ Date \_\_\_\_\_

Send to:

Sonoma Ecology Center  
c/o Tiffany Wing, Associate Director and Development Director  
PO Box 1486, Eldridge CA, 95431

tiffany@sonomaecologycenter.org  
707.363.0010