

Confidential Legacy Gift Intention Form



To: Kaushik Roy, Executive Director

I have made a provision for the Shanti Project in my estate plan to ensure that no individual should have to face a serious illness alone.

Name (please print): _____ Date: _____
Address: _____
City: _____ State: _____ Zip: _____
Email: _____ Phone: _____

Please check all that apply:

I have included the Shanti Project as a primary or secondary (contingent) beneficiary of my

- | | |
|--|---|
| <input type="checkbox"/> Will or Living Trust | <input type="checkbox"/> Financial or investment account(s) |
| <input type="checkbox"/> Retirement account(s) | <input type="checkbox"/> Charitable Trust |
| <input type="checkbox"/> Life Insurance or Annuity policy(ies) | <input type="checkbox"/> Other (please specify) |
-

(If your partner has done the same they may wish to fill out this form too!)

The amount of my gift will be:

- I prefer not to say at this time
 A specific amount of \$ _____
 A percentage gift of _____% which may result in a gift of \$ _____

Shanti would be privileged to recognize your generosity by naming you as a member (or members) of our Legacy Society if you wish to become a member. If you do, please print your title/name(s) as you would like it (them) to appear in Shanti publications.

Title/Name (please print): _____

- I/we prefer to remain anonymous.
 I/we do not wish to become a Legacy Society member

Legacy Society membership includes acknowledgement in Shanti publications and invitations to Legacy Society events.

This form is non-binding and does not constitute a legal promise of any future donation to the Shanti Project. I/we understand that bequests are revocable and that your estate plans may change.

Shanti is a 501c3 non-profit organization and our tax ID is 94-2297147. For help filling out this form, or for more information about our Legacy Society, please contact us at legacy@shanti.org or 415-674-4700.

Please return this form to:
Shanti Project, c/o Development Department, 730 Polk Street, San Francisco, CA 94109
Fax: 415-674-0373
Email: legacy@shanti.org