



## DECLARATION OF FUTURE INTENT

Thank you for your intention to include Nature Collective, formally known as San Elijo Lagoon Conservancy in your estate plan. In order to accurately document your intention, please complete this form with as much detail as you are willing to share. Any information about your gift will remain confidential and does not create a binding obligation.

### Recognition of Your Gift

☐ For recognition purposes, please list my/our name(s) as follows:

☐ Please do not include my/our name in any public listings of donors.

☐ I/We wish for my/our gift intention to be confidential and anonymous, publicly and in Nature Collective records.

☐ **No Gift Agreement/Letter** – Briefly describe allocation, designation, and how your gift should be used.

**Description and Value of Gift** - Please indicate below (by checking applicable options), how your future gift intention will be fulfilled and provide the estimated value for Nature Collective:

	<u>Description</u>	<b>Percentage of Gift</b>	<b>Estimated Amount of Gift</b>
<input type="checkbox"/>	<b>Will or Trust</b> with a sum of	_____	_____
<input type="checkbox"/>	<b>Charitable Gift Annuity</b> in the amount of	_____	_____
<input type="checkbox"/>	<b>Charitable Remainder Trust</b> in the amount of	_____	_____
<input type="checkbox"/>	<b>Remainder of Retirement Fund/IRA</b> with a total current value of	_____	_____
<input type="checkbox"/>	<b>Life Insurance Policy</b> with a policy value at maturity of	_____	_____
<input type="checkbox"/>	<b>Other Item or Asset</b> in the amount of <b>Please describe</b> (for example, private collections, real estate, securities, etc.):	_____	_____

☐ **Beneficiary** – If Nature Collective is only a contingent beneficiary, please explain conditions.

☐ **Documentation** - Please provide us with copies of any documents (or the relevant pages) that include provisions for Nature Collective.

**Please Complete Reverse Side**

## Contact Information

**Will or Trust** – If your gift is included in a will or trust, please provide the following:

### Executor(s) or Trustee(s)

Name and Address

Phone and/or Email

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**Beneficiary Designation** – If your gift is directed by a beneficiary designation, please provide the following:

### Administrator or Company

Name and Address

Phone and/or Email

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### Other Information, Contacts and Relationships You Want Us to Know (family, attorney, etc.)

Name and Address

Phone and/or Email and Relationship

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**This Declaration of Intent** enrolls you in Nature Collective's Legacy Circle.

- ☐ **New Intention** – This is a new bequest intention.
- ☐ **Update to Intention** – This is an update to a previously recorded bequest intention.

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

Print Name \_\_\_\_\_

Street Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Email and Phone Number \_\_\_\_\_

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

Print Name \_\_\_\_\_

Street Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Email and Phone Number \_\_\_\_\_

**Please send this form** (together with copies of any relevant documents) to:

### **Nature Collective, Planned Giving**

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