



# Legacy Society Gift Form

**Yes, I accept your invitation to join the San Francisco SPCA Legacy Society.**

Name(s): \_\_\_\_\_ Year of Birth \_\_\_\_\_

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

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

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

**Tell us what inspired your decision to include the SF SPCA as a beneficiary:**

\_\_\_\_\_  
\_\_\_\_\_

**Gift Information:** The information you provide is not legally binding and you may wish to change your gift in the future.

| WILL/TRUSTS   | OTHER ASSETS  |
|---|---|
| <input type="checkbox"/> Will: \$ _____ or % _____                                | <input type="checkbox"/> Retirement Plan/IRA: % _____                             |
| <input type="checkbox"/> Revocable Living: \$ _____ or % _____                    | <input type="checkbox"/> Donor-Advised Fund: % _____                              |
| <input type="checkbox"/> Charitable Remainder: \$ _____ or % _____                | <input type="checkbox"/> Savings/Other acct.: % _____                             |
| <input type="checkbox"/> Charitable Lead: \$ _____ or % _____                     | <input type="checkbox"/> Insurance Policy: % _____                                |
|   | <input type="checkbox"/> Real Estate: % _____                                     |
| <input type="checkbox"/> Copy or excerpt of document enclosed ( <i>optional</i> ) | Is your gift contingent? <input type="checkbox"/> Yes <input type="checkbox"/> No |

**Recognition:** Legacy Society members are recognized in SF SPCA's annual report and donor wall.

Please list my (our) name(s) as: \_\_\_\_\_

*I wish to remain anonymous to the public. Please do not list my name.*

**Signature(s):**

\_\_\_\_\_  
Date: \_\_\_\_\_

\_\_\_\_\_  
Date: \_\_\_\_\_

**Professional Estate Advisor:**  Attorney  Fiduciary  Financial Advisor  Other

Name of Firm/Company: \_\_\_\_\_

Name of Contact(s): \_\_\_\_\_

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

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

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

*Return your completed form to: San Francisco SPCA; Att: Development Department, 201 Alabama Street, San Francisco, CA 94103; email it to [development@sfsPCA.org](mailto:development@sfsPCA.org). For more information or questions, call 415.554.3029. San Francisco SPCA Tax ID: 94-0836580*