



PLANNED GIFT NOTIFICATION FORM

DONOR

Title _____ Name _____

Date of Birth _____

Address _____

City/State/Zip Code _____

Email _____ Phone _____

EXECUTOR NAME & PHONE NUMBER _____

TYPE OF BEQUEST

I (We) have made provisions for The Junior League of Austin in my (our) estate plan to support its mission at the time of bequest:

___ A stated gift of \$ _____

___ A stated percentage of my residuary estate equal to _____%; Good Faith Estimate of value _____

___ I (We) have included The Junior League of Austin as a beneficiary of the asset indicated below:

- Retirement plan(s)
- Financial or investment accounts
- Life insurance policy(ies)
- Other asset(s) (e.g. donor-advised fund)

___ I prefer not to disclose the details of my gift but confirm that I do have a planned gift established for the benefit of The Junior League of Austin.

Will this gift be distributed following the death of any additional persons? Y/N

If so, whom (e.g. spouse, child, or sibling)? Please list name(s) & relationship(s)

The Junior League of Austin will recognize planned gift donors in select publications of The Junior League of Austin, unless they choose to remain anonymous. Those who desire to remain

anonymous must initial and confirm below. Details of all planned gifts are by default confidential unless written notice is specified by the donor.

Please verify how you would like your name to be listed as a donor (include Mr., Mrs., Ms., Dr., etc.).

Your listing preference: _____
(please print)

_____ I/We wish to remain anonymous.

The Junior League of Austin recognizes that both the value of estate related gifts and the provisions themselves may change over time. This form is used for gift recognition purposes only, and it does not bind your estate or heirs in any way.

Date _____

Signature _____

Please return this form to:
The Junior League of Austin
Attn: Fund Development Vice President
5330 Bluffstone Lane
Austin, TX 78759

Or email it to:
funddevelopmentvp@jlaustin.org & president@jlaustin.org