



Notification of Future Intent within Estate Plan

Thank you for your intention to include the South Florida SPCA in your estate plan. We ask that you 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.

New intention ☐

Updated intention

New Intention ☐ ☐

☐ **Updated Intention**

Spouse name (if joint gift): _____

My/Our Information:

Name (print): _____

Address: _____ City: _____ State: _____ Zip Code: _____

Phone Number: _____ Email Address: _____

Gift Information:

I/We have provided a gift to the So FL SPCA as set forth in my/our:

- ☐ Will or Trust
- ☐ Life Insurance Policy
- ☐ Charitable Gift Annuity
- ☐ Charitable Remainder Unitrust
- ☐ Retirement Plan or Beneficiary Designation (401(k), 403(B), IRA, Keogh, Brokerage Account)
- ☐ Other Asset (s) (please describe): _____

The current estimated value of my/our gift is \$ _____. My/Our gift is _____% of the asset indicated above. If a percentage is given, what is the current estimated value of the percent in today's dollars \$ _____.

Estate Contact Information: Although optional, the following information is very helpful:

Executor, Trustee (if your gift is through a Will, Trust):

Administrating Company (ie. Vanguard, Fidelity, etc., if your gift is through a retirement account or life insurance policy):

Name: _____

Name: _____

Address: _____

Address: _____

City, State: _____ Zip Code: _____

City, State: _____

Phone: _____

Zip Code: _____

Phone: _____

Email: _____

Email: _____

Additional Contact/Relationship you may want us to know (family, attorney, etc.)

Name: _____ Relation: _____

Address: _____ City, State: _____ Zip Code: _____

Phone: _____ Email: _____

I/We understand this form does not create a binding obligation and any details about my/our gift will remain confidential. The South Florida SPCA Society for the Prevention of Cruelty to Animals understands that the size of my/our future gift may change.

Signature: _____ **Spouse Signature (if joint):** _____

Date: _____