



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. *For questions, please call Chris at (305) 825-8826. Please return completed form to chris@helpthehorses.org.*

New intention

Updated intention

Name and contact information:

Name (print): _____

Spouse name (if joint gift): _____

Address: _____

City: _____ State: _____ Zip code: _____

Phone: _____ Email: _____

Gift Information:

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

- | | |
|---|--|
| <input type="checkbox"/> Bank account | <input type="checkbox"/> Charitable Gift Annuity |
| <input type="checkbox"/> Will or Trust | <input type="checkbox"/> Charitable Remainder Unitrust |
| <input type="checkbox"/> Life Insurance Policy | <input type="checkbox"/> Donor Advised Fund |
| <input type="checkbox"/> Retirement Plan or Beneficiary Designation (401(k), 403(B), IRA, Keogh, Brokerage Account) | |
| <input type="checkbox"/> Other Asset (s) (please describe): | |

The current estimated value of my/our gift is \$_____.

If a percentage is given, what is the % provided _____ and 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) or **Administrating Company** (ie. Vanguard, Fidelity, etc., if your gift is through a retirement account or life insurance policy):

Contact name: _____

Address: _____

City: _____ State: _____ Zip code: _____

Phone: _____ Email: _____

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

Contact 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