



Confidential Legacy Society Confirmation Form

LEGACY SOCIETY

Welcome to the JVS SoCal Legacy Society – our way of recognizing friends like you who are helping to ensure that our life-changing programs and services continue for generations to come through an estate gift.

Name(s): _____

Address: _____

City: _____ State: _____ Zip: _____

Telephone: _____ Email: _____

You may recognize me/us in the JVS SoCal Legacy Society:

Please list my/our name(s) as: _____

My/Our gift is ☐ in honor of / ☐ in memory of / ☐ other: _____

☐ I prefer to remain anonymous.

I/We have included JVS SoCal in my/our estate plans through this type of gift:

☐ Outright gift in my will/living trust (\$ _____ or \$ _____ % of residual)

☐ Retirement plan (\$ _____ or _____ %)

☐ Real estate and/or personal property (\$ _____ or _____ %)

☐ Life insurance policy (\$ _____ or _____ %)

☐ Other asset(s): _____

My/Our gift is: ☐ Irrevocable ☐ Revocable

My/Our gift is designated to:

Endowment:

☐ \$ _____ or _____ % allocated to JVS SoCal Endowment

☐ \$ _____ or _____ % allocated to specific program(s) (please specify) _____

Current use of gift (will be used within 12 months of receipt):

☐ \$ _____ or _____ % allocated to JVS

☐ \$ _____ or _____ % allocated to specific program(s) (please specify) _____

Combined gift: (if you wish for your gift to benefit both endowment and current use, please contact us)

Please note that if no designation is specified, gifts of up to \$9,999 will be split equally for then current programs and JVS SoCal Endowment Fund. Gifts of \$10,000 and above will be placed in the JVS SoCal Endowment Fund.

Signature(s): _____ Date: _____

I/we understand that this document is not legally binding and may be changed at my/our discretion but will make every effort to fulfill my/our commitment.

Please return the completed form to:

Carole D. Tremblay, Director of Philanthropy

JVS SoCal • 6505 Wilshire Blvd., Suite 200 • Los Angeles • CA • 90048

Questions: Please contact Carole Tremblay at (323) 329-6959 or carole.tremblay@jvs-socal.org

JVS SoCal Tax ID: 95-1691012