



FUTURE GIFT INTENTION FORM

Thank you for your intention to include the San Francisco Foundation in your estate plans. In order to accurately document your gift and ensure that we carry out your plans as intended, please 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 legal obligation.

Donor Information

Name: _____ Date of Birth: ____/____/____

Name: _____ Date of Birth: ____/____/____

Address: _____

Email Address(es): _____

Home Phone: _____ Cell Phone(s): _____

Gift Information

- The San Francisco Foundation is already included in my/our estate plans.
- I/We intend to include The San Francisco Foundation in my/our estate plans.

Gift Type *(check all that apply)*

- Will or Living Trust
- Retirement Plan Assets
- Life Insurance Policy
- Charitable Remainder Trust
- Donor Advised Fund
- Other: _____

Gift Amount

- Specific Amount of \$ _____
- Percentage (____ %) currently estimated at \$ _____
- Contingent Beneficiary

Gift Purpose

- Unrestricted. Please use this gift to address future needs of the San Francisco Bay Area.
- Restricted for: _____



Recognition

This gift qualifies you to be a member of the Bay Area Promise Society, a society of donors who have shared their intention to provide a future gift. To recognize your generosity and to inspire others to make similar gifts, we would like to list you as a Bay Area Promise Society member. The nature and size of your estate gift will be kept strictly confidential.

The Foundation may list me/us as member(s) of the Bay Area Promise Society.

Print name(s) as you prefer to appear in recognition opportunities.

I/We prefer to remain anonymous for this gift.

Advisor Contact Information

Name: _____

Firm Address: _____

Phone: _____ Email: _____

My attorney / advisor referred me to the San Francisco Foundation

Gift Intention Documentation

To assist the San Francisco Foundation in the proper administration of this gift, attached is a copy of the will or trust provision or beneficiary designation form related to this gift plan.

If this gift plan is changed in the future, the San Francisco Foundation will be notified.

Donor Signature

Date

Donor Signature

Date



PLEASE RETURN TO:
Stephanie Dustman
Planned Giving Officer
San Francisco Foundation
One Embarcadero Center, Suite 1400
San Francisco, CA 94111
(415) 733-8534

