

Legacy Society: Planned Giving Form

Donor Information

Full Name: _____

Address: _____

Phone Number: _____ Email Address: _____

Gift Information (Confidential & Non-binding)

I/we have included **Junior Achievement of Greater Fairfield County (EIN 06-0644315)** in my/our estate plan through the following type of gift:

- | | |
|--|--|
| <input type="checkbox"/> Will or Living Trust | <input type="checkbox"/> Retirement Plan Beneficiary (e.g., IRA, 401(k)) |
| <input type="checkbox"/> Life Insurance Policy | <input type="checkbox"/> Charitable Remainder Trust |
| <input type="checkbox"/> Donor-Advised Fund | <input type="checkbox"/> Other: _____ |

Estimated Gift Value (if known): \$_____

I prefer not to disclose the estimated value at this time

Recognition

You may include my/our name(s) in your legacy society or recognition materials.

Please list as: _____

I/we wish to remain anonymous.

Documentation

I have enclosed a copy of the relevant page of my estate plan or beneficiary designation form.

I intend to share documentation in the future.

Financial Advisor or Legal Counsel Contact Information: _____

Signature

I/we understand that this form is not legally binding and is for informational purposes only.

Signature: _____ Date: _____

Spouse/Partner Signature (if applicable): _____ Date: _____

Contact

If you have any questions or would like to discuss your gift, please contact:

Alisa Jankowitz | *Major Gifts Officer*

O: 203.344.5782 | ajankowitz@jagfc.org