



Legacy Society Gift Intention Notification

The purpose of this notification is to summarize my/our intent to make a legacy gift in line with the mission of The Samaritan Center – Simi Valley. I/we wish to notify you of a legacy gift that I/we have made and for which I/we wish to be recognized as a member(s) of The Samaritan Center - Simi Valley Legacy Society.

Name(s) _____

Home Address _____

City _____ State _____ Zip _____

Telephone Number(s): _____

Email Address(es): _____

Legacy Gift Designation:

- My/Our gift is unrestricted (to be used where the need is greatest)
- Direct my/our legacy gift to benefit a specific program _____
- Direct my/our legacy gift to the Samaritan Center Endowment Fund
- Please see additional instructions below regarding the purpose and administration of my/our legacy gift
(Please attach a statement if necessary)

The Samaritan Center-Simi Valley is committed to fulfilling the objectives of the donor(s) as reflected in this legacy gift intention form. Should the purpose of this gift become obsolete, the Samaritan Center will consult with the donor(s) to find alternative ways to make use of the legacy gift for a purpose or purposes that are consistent with the original intentions of the donor(s). In the event the donor(s) is/are deceased, the Samaritan Center will use the gift for a similar purpose most consistent with the intention of the donor(s) and in accordance with the Samaritan Centers gift acceptance guidelines.

My/Our legacy gift arrangement has been or will be made as follows:

- | | |
|--|--|
| <input type="checkbox"/> Bequest (Gift in Will or Trust) | <input type="checkbox"/> Retirement Assets Designation |
| <input type="checkbox"/> Charitable Remainder Trust | <input type="checkbox"/> Gift of Life Insurance |
| <input type="checkbox"/> Charitable Lead Trust | <input type="checkbox"/> Retained Life Estate |
| <input type="checkbox"/> Charitable Gift Annuity | <input type="checkbox"/> Property |

I/We understand that this legacy gift intention is revocable and may be changed at any time. I further understand that I/we (and/or my estate) am/are not legally or morally obligated to fulfill this gift intention if I/we (and/or my estate) choose to modify or cancel my/our gift intention at a future date.

I/We will inform you if I/we change my intent or if the value of my/our gift significantly increases or decreases.

The Samaritan Center Simi Valley Legacy Society:

Yes, I/We give permission for The Samaritan Center -Simi Valley to publish my/our name(s) as member(s) of the Legacy Society in various publications and other publicity materials.

For recognition purposes related to the Legacy Society, please list my/our name(s) as follows:

I/We prefer to remain private. Please do not publish my/our names.

PRINT NAME

PRINT NAME

Signature

Signature

Date

ACCEPTED BY: _____
The Samaritan Center – Simi Valley

PRIVACY STATEMENT

The Samaritan Center-Simi Valley is committed to protecting your privacy. We collect donor information so that we can offer personalized stewardship of your gift. We treat this information as private and confidential, and we will never disclose your data to third parties unless required by law or upon your request. We will not distribute your donor information to be used in mailing lists, surveys, or any other purpose other than what is required to perform our services.