



The Greater Farallones Legacy Society was created to recognize and honor those special friends who have chosen to include the Greater Farallones Association in their estate plans. They strongly desire to support our work in restoration, scientific research, and education, which increase public knowledge and awareness of the Greater Farallones and Cordell Bank National Marine Sanctuaries. Benefits of Membership in the Greater Farallones Legacy Society:

You can extend your commitment to conserving the ocean habitat far beyond your lifetime. When you notify us that you have included the Greater Farallones Association in your estate plans, you automatically become a Greater Farallones Legacy Society member. You will receive these special benefits:

- Invitations - You will be invited to special events such as Soirees, Explorations and more.
- Listing in the Association's Annual Report and other publications. (If you prefer to remain anonymous, we will respect your wishes, but please let us know).

Gifts in Your Will

A bequest to the Greater Farallones Association can be accomplished with a simple statement in your will, in a codicil to an existing will, or a revocable/living trust.

Specific bequest: *"I give and bequeath to the Greater Farallones Association the sum of \$_____ to be used for the general purposes of the organization."*

Residuary bequest: *"I give and bequeath to the Greater Farallones Association ____ percent of the rest, residue, and remainder of my estate to be used for the organization's general purposes."*

If you wish, you may designate that your gift be explicitly used for restoration, science, or educational programs.

Gifts in Trust

The creation of a Charitable Remainder Trust, either during your lifetime or through your will, allows you to convert highly appreciated assets such as stocks or real estate into tax-sheltered income. By establishing a Charitable Remainder Trust, you can support the Greater Farallones Association, defer capital gains taxes on the sale of Trust assets, provide an immediate charitable income tax deduction if the gift is made during your lifetime, reduce estate taxes upon death, and provide a spendable income for yourself or other beneficiaries you choose.

It may sound complicated, but it's actually rather simple. Money, securities, or other property are transferred to a trustee (that could be you) who will manage the assets and pay an income to you (or someone you designate). When the trust terminates, the trustee transfers the remaining principal to the Greater Farallones Association.

Gifts Listing the Greater Farallones Association as a Beneficiary:

You can make the Greater Farallones Association the beneficiary on life insurance policies, retirement accounts, IRA accounts, etc. Our Federal tax ID number is **94-3227237**.

Please let us know if you plan to include the Greater Farallones in your legacy planning by completing a Legacy Society Letter of Intent. If you have questions or would like to discuss the different ways of making a legacy gift to Greater Farallones Association, please contact Monika Krach at (415) 561-6625 or email donate@farallones.org.



This signed document verifies my intent to support the work of the **Greater Farallones Association** through my legacy plan. I understand that this form is not legally binding.

Intention

I have made/intend to make a provision for the Greater Farallones Association in my legacy plan through:

- Bequest in my will
- Charitable gift annuity
- Charitable remainder trust
- Charitable lead trust
- Living trust
- Retirement plan
- Life insurance policy
- Other

My legacy gift has been designated in the following way:

- Percentage _____%
- Residual _____%
- Specific amount _____
- Contingency

A copy or excerpt of my document is enclosed (optional except for irrevocable trusts)

- Yes
- No

Professional Advisor: I have notified the following professional advisory of this gift (optional)

Name _____
 Address _____
 City _____ State _____ Zip _____
 Phone _____ Email _____

Legacy Society Recognition

Please publicly acknowledge me as a member of the Legacy Society
I would like to remain anonymous

My Contact Information

Name _____
 Address _____
 City _____ State _____ Zip _____
 Phone _____ Email _____
 Signature _____ Date _____

Please return form to donate@farallones.org. Greater Farallones Association Tax ID number is 94-3227237.