



## The SOAR Legacy

Welcome to the SOAR Legacy, a membership that recognizes all those who have included SOAR Inc. in their estate plans through a bequest provision in their will or trust, a life-income gift or other deferred gift.

Today's Date			
Name (s)		Date of Birth	/ /
Name (s)		Date of Birth	/ /
Email		Phone #	

### A. SOAR LEGACY MEMBERSHIP LISTING

- ☐ I/we prefer my/our name(s) to be listed as: \_\_\_\_\_  
(Type and amount of gift will not be listed.) [ Print Clearly ]
- ☐ I/we prefer to remain anonymous\*

### B. MY/OUR FUTURE GIFT

Sample types of gifts: bequest in will or trust; life insurance policy beneficiary; qualified retirement plan (IRS. 401k. 403b) beneficiary; charitable remainder trust; etc.

Type of Gift	Estimated Value	Comments

SOAR Inc. is a nonprofit 501(c)4 (tax ID #77-0526592). Donations to SOAR Inc. are not tax-deductible but are one of the best investments you can make for the future of Ventura County. SOAR Inc. will direct all planned gifts according to our gift acceptance policy. If you would like to learn more, discuss a restricted gift, or a tax-deductible gift to our 501(c)3 sister organization, SOAR Nonprofit, please contact Van Vibber at [van@soarvc.org](mailto:van@soarvc.org) or (310) 883-4537.

### C. DOCUMENTATION

- ☐ Yes, I/we will share a copy of the portion of the will that applies to SOAR, or the trust agreement or change of beneficiary form (401k, 403b, IRAs, insurance) in which SOAR Inc. is named.

\*Note that donations to SOAR Inc. are subject to any applicable FPPC reporting requirements.