

# Declaration of Bequest Intention



By completing this form you signify your intention to name Catalina Island Conservancy (Federal Tax ID 23-7228407) as a beneficiary of your estate and your wish to become a member of the Conservancy's Legacy Society, which honors those who have made legacy gifts. The Conservancy understands that all bequest provisions are revocable and that any intentions stated here are not binding on you or your estate. We are deeply grateful for your vision and generosity.

**I have named Catalina Island Conservancy as a beneficiary of:** (Check as many as apply)

- |   |   |
|---|---|
| <input type="checkbox"/> My Last Will and Testament     | <input type="checkbox"/> Life Insurance Policy  |
| <input type="checkbox"/> Retirement Account             | <input type="checkbox"/> Donor Advised Fund     |
| <input type="checkbox"/> Revocable Trust (Living Trust) | <input type="checkbox"/> Other (please specify) |
| <input type="checkbox"/> Charitable Trust               | _____   |

**My provision (s) names the Conservancy as:**

- |  |  |   |
|--|--|---|
| <input type="checkbox"/> Primary Beneficiary | <input type="checkbox"/> Secondary Beneficiary | <input type="checkbox"/> Contingent Beneficiary |
|--|--|---|

I estimate that the total value of my gift will be \$\_\_\_\_\_

**If/when this gift is received by the Conservancy, it is my wish that the organization use my gift for the following purpose:**

- |  |
|--|
| <input type="checkbox"/> Unrestricted Operating/Area of Greatest Need        |
| <input type="checkbox"/> Other _____ / (Conservation, Education, Recreation) |

**I understand that my commitment to leave a legacy gift through my estate entitles me to enrollment in the Conservancy's Legacy Society and special recognition during events and in publications.**

- |   |
|---|
| <input type="checkbox"/> Yes, the Conservancy may publish my name as a member of the Legacy Society.          |
| <input type="checkbox"/> I am pleased to become a member of the Legacy Society, but wish to remain anonymous. |

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Date

To facilitate our ability to honor the intentions set forth above, we would greatly appreciate a copy of your Will or Trust (or appropriate sections thereof) for safekeeping in our confidential files.

*Thank you*

**Please return to:** Jen Poyer - Director, Donor Engagement | Catalina Island Conservancy | 320 Golden Shore, Suite 220, Long Beach, CA 90802 | [jpoyer@catalinaconservancy.org](mailto:jpoyer@catalinaconservancy.org) | 562.437.8555 x1231

*As with any decision involving your assets, we urge you to seek the advice of your professional counsel when considering a gift to Catalina Island Conservancy.*