

# Planned Giving Intent



**Donor Name (s) as you would like it to appear:**

\_\_\_\_\_ or check this box  if you'd like to remain anonymous

It is my(our) intent to include SCI Foundation in my(our) estate plans using the following vehicle(s):

## **TRUST/WILL/BEQUEST**

**Sample language to share with your attorney to leave a bequest from your Trust or Will:** "I give and devise to Safari Club International Foundation, a Section 501(c)(3) organization, Tucson, Arizona, (all or stated percentage) of the rest, residue and remainder of my estate, both real and personal, to be held, administered, and used by the Board of Directors for the unrestricted support of the conservation and education programs of the Foundation. ... I instruct that all my charitable gifts shall be made, to the extent possible, from property constituting "income in respect of a decedent" as that term is defined in the Internal Revenue Code." Please provide detail on type of trust(s) used (i.e., irrevocable trust, Charitable Remainder Trust, Charitable Lead Trust, etc. \_\_\_\_\_

## **CHARITABLE GIFT ANNUITY**

**How it works:** In exchange for a gift, SCI Foundation agrees by contract to pay a fixed amount each year to one or two beneficiaries (the annuitants) for life. The amount of the annuity payment will depend on the ages of the annuitants and the value of the assets donated. SCI Foundation offers the rates that are suggested by the American Council on Gift Annuities, a national organization. Upon establishing a charitable gift annuity, you are entitled to a current income tax deduction for a portion of the value of the assets given to fund the charitable gift annuity.

## **GIFT OF SECURITIES**

**How to make a gift of Securities:** Marketable securities can simply be transferred to SCI Foundation's brokerage account. Please contact us for information.

## **IRA, 401K, ANNUITY, OR OTHER RETIREMENT ACCOUNT ASSETS**

**How to leave a gift of Retirement Plan Assets:** It's easy to give remaining retirement plan assets to SCI Foundation. It is an extremely effective strategy to reduce estate and/or income taxes. Here are some ways you can make a significant future gift to SCI Foundation through your retirement plan (401k, 403b, IRA's): (i) Name SCI Foundation as a primary beneficiary of part or all remaining assets in your retirement plan at your death, (ii) Name SCI Foundation as a contingent beneficiary of the plan, (iii) Name SCI Foundation at the death of your surviving spouse. Simply request a change of beneficiary form from either your employer or the financial institution managing your retirement plan(s). Make the necessary changes, return the form to your retirement plan manager and notify SCI Foundation of your intent.

**LIFE INSURANCE POLICY**

**The benefits to gifting Life Insurance and How to do it:** A gift of a life insurance policy often allows you to make a substantially larger charitable gift than would otherwise be possible. Charitable life insurance gifts generate tax deductions based on the premium payments and your estate remains undiminished in spite of making a substantial charitable gift. You may transfer the policy to SCI Foundation so that SCI Foundation becomes the owner and beneficiary. You may be entitled to an immediate charitable deduction for income tax purposes and, if you continue to pay premiums, each payment may also be a deductible donation.

**Additional Comments:**

---

---

---

---

---

---

If you are willing and it is appropriate, please include copies of any pages from your estate planning documents that include the Foundation so that we may verify the accuracy of the language and ensure that your gift is handled accurately. In addition, if you would like you can provide us an estimated amount of benefit that the Foundation is expected to receive here: \$ \_\_\_\_\_

**Signature(s):**

I hereby declare my intent to include SCI Foundation in my estate plans with the vehicle(s) indicated above and authorize the Foundation to recognize my intent using the name(s) indicated above:

\_\_\_\_\_  
Donor Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Joint Donor Signature

\_\_\_\_\_  
Date

**Return Form**

Please mail or email this form to:

Safari Club International Foundation  
Attn: Gordon Nelson, CPA, CFP®  
595 S. Riverwoods Pkwy, Ste 170  
Logan, UT 84321  
[gnelson@safariclub.org](mailto:gnelson@safariclub.org)  
(435) 213-9986

