



Bequest Designation Form

Thank you for your intention to include Sacramento Waldorf School in your estate plan. To accurately document your intention, please complete this form with as much detail as you are willing to share. Any information about your gift will remain confidential and does not create a binding obligation.

Recognition of Your Gift

For recognition purposes, please list my/our name(s) as follows:

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- Please do not include my/our name in any public listings of donors.
 - I/We wish for my/our gift intention to be confidential and anonymous, publicly.
 - I/We wish for my/our gift intention to be confidential and anonymous, publicly and in Sacramento Waldorf School's records.
 - Gift Agreement/Letter** – I/We have signed a Gift or Letter Agreement with Sacramento Waldorf School for this gift and have made no changes to the designation or purpose.
 - No Gift Agreement/Letter** – Briefly describe allocation, designation, and how your gift should be used.
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Description and Value of Gift

Please indicate below (by checking applicable options), how your future gift intention will be fulfilled and provide the estimated value for Sacramento Waldorf School:

Description	Amount or Percentage	Estimated Amount of Gift to Sacramento Waldorf School
<input type="checkbox"/> Will or Trust with a sum of	_____	_____
<input type="checkbox"/> Charitable Remainder/Lead Trust in the amount of	_____	_____
<input type="checkbox"/> Donor Advised Fund In the amount of	_____	_____
<input type="checkbox"/> Required Minimum Distribution (QCD) with a total current value of	_____	_____
<input type="checkbox"/> Life Insurance Policy with a policy value at maturity of	_____	_____
<input type="checkbox"/> Charitable Gift Annuity in the amount of	_____	_____
<input type="checkbox"/> Other Item or Asset in the amount of	_____	_____
Please describe (For example, private collections, real estate, securities, etc.)		

Beneficiary – If Sacramento Waldorf School is only a contingent beneficiary, please explain conditions:

Documentation – Please provide us with copies of any documents (or the relevant pages) that include provisions for Sacramento Waldorf School.

Contact Information

Will or Trust: If your gift is included in a will or trust, please provide the following for the Executor(s) or Trustee(s):

Name and Address

Phone and/or Email

Beneficiary Designation: If your gift is directed by a beneficiary designation, please provide the following for the Administrator or Company:

Name and Address

Phone and/or Email

Other Information, Contacts and Relationships you want us to have, for family members, your attorney, etc.

Name and Address

Phone and/or Email

This Declaration of Intent will confirm your bequest to the school. You will be contacted by a member of our Development staff regarding your participation.

- New Intention** – This is a new bequest intention to Sacramento Waldorf School.
- Update to Intention** – This is an update to a previously recorded bequest intention to Sacramento Waldorf School.

Signature _____ Date _____

Print Name _____

Street Address _____

City, State, Zip _____

Email _____ Phone Number _____

Signature _____ Date _____

Print Name _____

Street Address _____

City, State, Zip _____

Email _____ Phone Number _____

Please send this form, together with copies of any relevant documents, to the following address. Feel free to contact us if you have any questions or concerns at: development@sacwaldorf.org or 916-860-2524.

Development Department - Sacramento Waldorf School - 3750 Bannister Road - Fair Oaks, CA 95670