

Bequest Intention Form

CONFIDENTIAL



Thank you for your generous bequest commitment to the Coral Reef Alliance (CORAL). Your legacy gift will help us plan for the future as we work to save the world's coral reefs. This form helps us better understand the intentions for your gift. The information you provide is not legally binding.

Questions? Email Michael Allen, CORAL'S Major Gifts Officer, at mallen@coral.org.

Name(s): _____

Date(s) of Birth: _____

Address: _____

City: _____ State: _____ ZIP: _____

Phone: _____ Email: _____

About Your Gift - if you are willing to disclose more information about your gift, please check all that apply and estimate value in today's \$USD.

- Will: \$ _____
- Revocable Living Trust: \$ _____
- Charitable Remainder Trust: \$ _____
- Insurance Policy \$ _____
- Real Estate \$ _____
- Retirement Plan/IRA \$ _____
- Other Asset(s): \$ _____

Your gift will be used as unrestricted support for the highest priorities of the Coral Reef Alliance.

If you would prefer to designate for a specific purpose, or if your gift is contingent, please specify here:

How would you like to be recognized for your gift?

- I/we would like to be listed as legacy donors, which may include listing my/our gift within a dollar range. Please list as: _____
- I/we wish to remain anonymous for this gift.

(Optional) Please share the name of your Financial Advisor/Will Executor: _____

Phone: _____ Email: _____

Signature(s): _____ **Date:** _____

_____ **Date:** _____

Please return this form to the Coral Reef Alliance at 548 Market Street, Suite 29802 San Francisco, CA 94104-5401 or email to mnorman@coral.org