



Estate Planning Letter of Intent

(Notification of intent to include Pawsitive Teams, Inc. in an Estate Plan)

As an indication of my/our support to help sustain Pawsitive Teams, Inc. programs and mission for future generations, I am pleased to report my/our intent to include a gift in my/our estate plan on behalf of Pawsitive Teams, Inc. It is my/our understanding that this information is being collected to help Pawsitive Teams, Inc. project future support and is **not considered a binding legal obligation, and that it may be changed without notice.**

Please check all boxes that apply:

- I/we plan to include Pawsitive Teams, Inc. as a charitable beneficiary of my/our **Will or Revocable Living Trust.**
- I/we plan to name Pawsitive Teams, Inc. as beneficiary in a **Retirement Plan.**
- I/we plan to name Pawsitive Teams, Inc. as a beneficiary in a **Life Insurance Policy.**
- I/we plan to include Pawsitive Teams, Inc. as a beneficiary in a **manner other than those described above** (please specify):

- It is my/our understanding that upon maturation our estate gift(s) will be included in the Pawsitive Teams Endowment Fund administered by the San Diego Foundation and that the principal of the gift(s) will be protected in perpetuity.

The date by which I/we intend to confirm my/our commitment as stated above is:

In regard to listing my/our name as a member of the Pawsitive Teams Legacy Society:

- I would like my/our name to appear as follows: _____
- Please do not list my/our name. My/our commitment should appear as "Anonymous."

Signature

Date

Print Name(s)

Address

Phone

Email Address

Because Pawsitive Teams, Inc. cannot give tax or legal advice, donors are strongly encouraged to consult with their personal tax and legal advisors before deciding on a gifting option.

PLEASE COMPLETE AND MAIL THIS FORM TO:

Eileen Heveron, Exec. Director, Pawsitive Teams, 7301 Carroll Rd, San Diego, CA 92121