



The Land Trust

For Santa Barbara County

LEGACY SOCIETY PLANNED GIVING LETTER OF INTENT

THANK YOU for including the Land Trust in your estate planning. Please provide the following information to your attorney for official documents: The Land Trust for Santa Barbara County, PO Box 91830, Santa Barbara, CA 93190. Federal tax identification number: 95-3797404.

Please complete this form with as much detail as you are willing to share. The information provided will remain confidential.

Name

Address

City, State, Zip Code

Phone

Email

Signature

Date

TYPE OF PLANNED GIFT

☐ Will/Living Trust

☐ Charitable Trust

☐ IRA/Retirement Account

☐ Life Insurance Beneficiary

☐ Bank, Brokerage or other Financial Account

☐ Other (please specify)

RECOGNITION

☐ I would like to be acknowledged as a Land Trust Legacy Society member.

Please list name(s) as follows: _____

☐ I would prefer to remain anonymous

ESTATE CONTACT INFORMATION

Although optional, providing information on your executor/trustee or administrating company is very helpful.

Name

Address

City, State, Zip Code

Phone

Email

Please return to Vanessa Stowers, Development Director, Land Trust for Santa Barbara County PO Box 91830, Santa Barbara, CA 93190. (805)966-4520 vstowers@sblandtrust.org

Completion of this form is a notification of intent and not intended to be legally binding.