



# SARATOGA WarHorse

## Notification of Legacy Gift

I believe in the positive work that Saratoga WarHorse Foundation is doing to improve the health and quality of life for military veterans and retired racehorses. As evidence of my desire to provide a legacy of support to these veterans and horses, I hereby notify Saratoga WarHorse Foundation that I have made a provision for a deferred gift to this life-changing organization through my estate plans.

**Full Name** \_\_\_\_\_

**Spouse Full Name  
(if applicable)** \_\_\_\_\_

**Primary Street Address** \_\_\_\_\_

**City** \_\_\_\_\_ **State** \_\_\_\_\_ **Zip** \_\_\_\_\_

**Phone Number(s)** \_\_\_\_\_ **E-mail** \_\_\_\_\_

**Date of Birth** \_\_\_\_\_ **Spouse Date of Birth** \_\_\_\_\_

### Planned Giving Statement of Intent

The provision(s) made include the following (please provide details on the following page):

- An outright bequest upon the passing of the primary donor through a will or trust
- An outright bequest upon the passing of the primary donor and spouse through a will or trust
- A life insurance policy, in which Saratoga WarHorse is named as beneficiary
- Retirement assets, in which Saratoga WarHorse is named as a beneficiary
- A trust or annuity, with income reserved for the donor, spouse, or other income beneficiary.
- Other (please specify) \_\_\_\_\_

**The estimated value of my (our) gift is \$** \_\_\_\_\_

## Purpose

It is my wish that my gift be used in the following way:

\_\_\_\_ At Saratoga WarHorse's discretion, to create the greatest impact as determined by the Board

\_\_\_\_ Investment in Saratoga WarHorse's general Endowment Fund

\_\_\_\_ I/We wish to discuss other potential gift designations with Saratoga WarHorse

Would you like your gift to be made "In Honor" of somebody? Yes \_\_\_\_\_ No \_\_\_\_\_

*Name of Honoree:* \_\_\_\_\_

Would you like your gift to be made "In Memory" of somebody? Yes \_\_\_\_\_ No \_\_\_\_\_

*Name of Memorialized:* \_\_\_\_\_

If "Yes", may we notify this person or their family of the details of your gift? Yes \_\_\_\_\_ No \_\_\_\_\_

***Additional details and/or special circumstances of my gift:***

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**I/We would like to work with Saratoga WarHorse to create a Memorandum of Understanding that outlines the details of my/our gift. Yes \_\_\_\_\_ No \_\_\_\_\_**

## Recognition

Saratoga WarHorse appreciates the opportunity to acknowledge your commitment to our future by publicly recognizing your contribution. If you prefer to remain anonymous, however, we will respect your wishes.

\_\_\_\_ I/We permit Saratoga WarHorse to use my/our name(s) to recognize this gift.

*Name as you would like it to appear in written recognition materials:*

\_\_\_\_ I/We prefer to remain anonymous during my/our lifetime(s). You may recognize my/our gift after you receive it.

\_\_\_\_ I/We prefer to remain anonymous during and after my/our lifetime(s).

***I understand that neither this document nor the estimated gift value are legally binding. At any time, I may choose to add, subtract, or otherwise alter my estate gift, in my sole and absolute discretion.***

\_\_\_\_\_  
*Primary Donor Signature*

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*Spouse Signature, if applicable*

\_\_\_\_\_  
*Date*