



Prepared. *For the Future*

For the Silicon Valley Monterey Bay Council to continue to deliver the quality Scouting programs to our youth, three fundamental pillars must be sustained and increased: operating income, capital income and endowment income. Encouraging endowment gifts to our council is one of our highest priorities. It is one of the best ways to ensure that our council can continue to offer the outstanding programs it now has and also grow to meet the needs of the youth and communities we serve.

Recently we have embarked on a campaign to identify Scouters who have made arrangement (or intend to make arrangements) for Scouting in their estate plans.

We request your support and participation in this endeavor by completing the below questionnaire and returning it to Heather Lerner. All responses will be kept confidential and only reported in the aggregate. Thank you for your support.

I have already arranged to leave a gift to Scouting in my estate

Details you can share \$ _____

- | | | |
|--------------------------------------------------------|-------------------------------------------------------|-----------------------------------------------------|
| <input type="checkbox"/> Bequest (will or trust) | <input type="checkbox"/> Gift of Appreciated Property | <input type="checkbox"/> Charitable Lead Trust |
| <input type="checkbox"/> IRA (other tax deferred fund) | <input type="checkbox"/> Life Insurance Designation | <input type="checkbox"/> Charitable Remainder Trust |
| <input type="checkbox"/> Other _____ | | |

It is my intention to leave something for Scouting in my estate

If known: \$ _____ Estimate

I am undecided at this point in my estate decisions

I do not intend (at this time) to provide for Scouting in my estate

Please contact me- I have questions about endowment or estate planning

Name: _____

Phone/Email: _____

Direct responses to:
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Heather.Lerner@scouting.org
Direct Line: 408.638.8316



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