



Confidential Information
Legacy Circle Planned or Pledged Gift to Sonoma Valley Museum of Art (SVMA)

Name(s)

Mailing Address:

Telephone: _____ Email Address: _____

A. Please Indicate:

_____ I/We have made provisions for a future gift to SVMA

_____ I/We are considering making a future gift to SVMA from my/our estate

B. I/We have or will use the following to make our legacy gift:

- Will
- Living Trust
- Retirement Plan Assets (IRA, Stock, Etc.)
- Life Insurance Policy
- Other (prefer to discuss with staff)

C. I/We request that this gift ultimately be used for:

- General (unrestricted to best support SVMA)
- Other (restricted): please specify and check all that apply
 - A.R.T.S (Art Rewards the Student)
 - Exhibitions
 - Public Programming/Special Events
 - Other: (Please Specify): _____

D. Recognition Preferences:

- I/We authorize the Sonoma Valley Museum of Art to include my/our name(s) as a Member/s of the Legacy Circle and in publications.
- I/We do not wish to have our gift recognized publicly. Please do not include my/our name(s) in any publications.

I understand that this form is non-binding and revocable.

Donor Signature: _____ Date: _____

Donor Signature: _____ Date: _____

Please complete and return this form to SVMA, PO Box 322, Sonoma, CA 95476,
Attention: Development Department

Please consult your attorney, tax advisor, or other professional for advice in all estate-planning matters. This document is not offered as legal or tax advice.