



Planned Gift Notification Form

Thank you for your commitment to the future of The Junior League of Austin (JLA). By sharing your plans with us, you allow us to express our gratitude during your lifetime and ensure your gift is used exactly as you intend.

I. Donor Information

Name(s): _____ Date of Birth: _____

Address: _____

City/State/Zip: _____

Email: _____ Phone: _____

II. Gift Provisions

I/We have made provisions for The Junior League of Austin in my/our estate plan to support its mission.

Type of Gift (Please check all that apply):

Specific Dollar Amount: \$ _____

Percentage of Estate: % *(Estimated Value: \$ _____)*

Beneficiary Designation: I/We have named JLA as a beneficiary of the following:

Retirement Plan (401k, IRA, etc.)

Life Insurance Policy

Financial/Investment Account

Other Asset (e.g., Donor-Advised Fund): _____

Confidential: I prefer not to disclose specific details but confirm that I have established a planned gift for the benefit of The Junior League of Austin.

Is this gift contingent upon the death of others? (e.g., a spouse or child) No or Yes: (Please list name and relationship) _____

III. Recognition & Privacy

JLA enjoys celebrating our visionary donors in select publications. All gift details are kept strictly confidential.

Donor Listing Preference (Example: Mr. and Mrs. Smith, The Smith Family, or Jane Doe):

I/We wish to remain anonymous. (Please initial here: _____)

IV. Acknowledgment

This form is used for gift recognition purposes only. It is a statement of current intent and does not constitute a legally binding obligation on you or your estate.

Signature: _____ Date: _____

Please Return Completed Form To:

The Junior League of Austin | Attn: Fund Development VP | 5330 Bluffstone Lane | Austin, TX 78759

Or Email: funddevelopmentvp@jlaustin.org