

  
**Planned Giving Notification Form**

If you have made provisions for the Santa Barbara Botanic Garden in your will, trust, life insurance policy or retirement plans, please complete this form to aid the Garden in seeing that your wishes are fulfilled as you intended. Mail to the address below. **Direct questions to Heidi Whitman, Director of Development at 805-682-4726, ext.133 or hwhitman@sbbg.org.**

Full legal name: **Santa Barbara Botanic Garden**  
Address: **1212 Mission Canyon Road, Santa Barbara, CA 93105**  
Tax ID number: **95-1644628**

Name(s): \_\_\_\_\_

Address: \_\_\_\_\_

Telephone Home/Work: \_\_\_\_\_ Email address: \_\_\_\_\_

Please indicate the type of gift:

Bequest in Will or Living Trust       Retirement Plan       Life Insurance Policy

Charitable Remainder Trust or Unitrust      Other: \_\_\_\_\_

General description of gift provision (dollar amount, percentage, present value, etc.):

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Attorney's name: \_\_\_\_\_ Phone: \_\_\_\_\_

I wish my future gift to be used to benefit the Garden where the need is greatest

OR

I wish my future gift to be used to benefit

Research

Conservation

Horticulture

Education

If possible, please include a copy of the portion of your planned gift that pertains to the Garden and expresses your wishes.

I understand that this documentation is offered solely to assist the Santa Barbara Botanic Garden and will remain **strictly confidential**. My gift is:

Revocable

Irrevocable

Signature of Donor: \_\_\_\_\_ Date: \_\_\_\_\_

Signature of Donor: \_\_\_\_\_ Date: \_\_\_\_\_

(Please choose A or B)

A.  I/We would be pleased to be recognized in the Blaksley Bliss Society to serve as encouragement for others to give. My/Our name(s) should appear as:

\_\_\_\_\_  
B. I/We prefer to remain anonymous