

EDIE WINDSOR
• Challenge Fund •
SAGE LEGACY MATCH
CAMPAIGN

Through a matched contribution from the Edie Windsor Challenge Fund, my legacy will support SAGE's efforts on behalf of LGBT Elders both now* and in the future. My bequest is revocable, and my estate plans may change.

Name(s) (Please Print): _____

Address: _____

City: _____ State: _____ Zip: _____

Email: _____ Phone: _____

1. I have named SAGE as a beneficiary of my

- Will/Living Trust Retirement Plan Life Insurance Policy Bank Account

2. My gift is stated as

the specific amount of \$ _____
OR

a percentage which is currently worth approximately \$ _____
(Please provide your best good-faith estimate of the value of your gift based on the approximate current value of your assets).

3. My bequest to SAGE depends on a contingency, such as the prior death of a spouse, partner, or child.
 My spouse/partner has done the same. SAGE will receive a gift upon the passing of the second of us.

4. I have have not previously notified SAGE of my intention to include SAGE in my planning.

5. Please send me information about being included in the SAGE's Taylor Legacy Society.

If possible please share a copy of the relevant pages of your will or trust, beneficiary designation form, or form opening your bank account, and kindly return them with this form in the envelope provided.

Please return to:
SAGE Legacy Planning
305 Seventh Ave., 15th Floor
New York, NY 10001

If you have questions about the SAGE Legacy Match Campaign or would like help in finding a gift that is right for you, please contact Jerry Chasen, Director of Legacy Planning at 212-741-2247 x240, or by email at legacy@sageusa.org

**Terms of the match: If, as of July 1, 2018,*

- you had not yet told SAGE it was in your legacy planning, SAGE will receive \$1 for every \$10 of the value in question 2 (up to \$200,000) from the Edie Windsor Challenge Fund.*
- you had previously told SAGE it was in your legacy planning, but hadn't told us of its nature or value, SAGE will receive \$1 for every \$20 of the value in question 2 (up to \$400,000) from the Edie Windsor Challenge Fund.*
- you had not yet told SAGE it was in your legacy planning, and do not list a value in question 2, SAGE will receive \$1,000 from the Edie Windsor Challenge Fund.*