

Federal Tax ID#: 271016100

The Sergei Foundation, Inc.  
Attn: Development  
PO Box 17256  
Winston-Salem, NC 27116  
email: info@sergeifoundation.org  
fax: (336) 306-8783  
phone: (336) 306-6861

## PLANNED GIVING/PLEDGE FORM

As a charitable non-profit organization, planned gifts enable us to focus more on saving companion pets' lives, keeping them with their human families, and increase the level of assistance we are able to provide to programs and their expansion.

This document is a helpful tool that assists us in ensuring the best possible stewardship of your generously planned gifts to The Sergei Foundation. This is not a legal document. The information you provide will assist our planning and inform us of your recognition wishes.

To assist The Sergei Foundation in its mission to save companion pets' lives by providing veterinary financial assistance to families unable to afford emergency, life-saving care, I would like to provide the following information (check all that apply).

I pledge a total gift of \$ \_\_\_\_\_ enclosed OR to be paid in 2016.  
Please detail when and approximate disbursements so we may send a reminder (ex: 50% in January, 50% in July).

\_\_\_\_\_

I have included The Sergei Foundation, Inc. in my will or living trust.

I have established an income-producing gift plan for the benefit of The Sergei Foundation, Inc. (gift annuity, charitable remainder trust, other).

I have made other estate provisions naming The Sergei Foundation, Inc. as beneficiary.

\_\_\_\_\_

\_\_\_\_\_

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

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Home Phone \_\_\_\_\_ Work: \_\_\_\_\_ Email: \_\_\_\_\_

I/We would be pleased to be publicly recognized for this gift. The name(s) will appear as listed above. The terms of my gift will remain confidential to the public.

I/We prefer to remain anonymous.

Signature \_\_\_\_\_

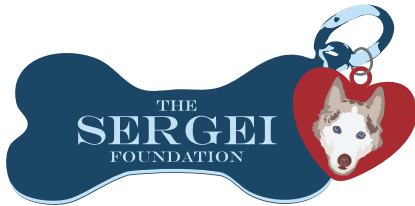
Date \_\_\_\_\_

Printed Name \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_

Printed Name: \_\_\_\_\_



Federal Tax ID#: 271016100

## SUGGESTIONS FOR BEQUEST VERBIAGE

You may include a bequest to support to The Sergei Foundation, Inc. when preparing your will or by adding a codicil to your present will. Bequests may be of cash, securities, real estate or other property. Bequests of all sizes are welcome, whether they are outright, contingent or residual.

The following information is not intended to be legal or tax advice. We recommend that you consult with a qualified estate planning attorney when drafting your will. These are suggestions only to be of assistance to you or your attorney when filling out the Sergei Foundation's Planned Giving Form:

### **Specific Bequest:**

"I give The Sergei Foundation, Inc., Winston-Salem, North Carolina 27116 the sum of \$ \_\_\_\_\_ to be used for the general support of The Sergei Foundation."

### **Residual Bequest :**

"I give The Sergei Foundation, Inc., Winston-Salem, North Carolina 27116 , \_\_\_\_\_ percent of the residue of my estate to be used for the general support of The Sergei Foundation."

### **Contingent Bequest:**

"In the event that \_\_\_\_\_ predeceases me, I give The Sergei Foundation, Winston-Salem, North Carolina 27116, the sum of \$ \_\_\_\_\_ (or, alternatively, \_\_\_\_\_ percent of the residue of my estate) to be used for the general support of The Sergei Foundation."

If your are considering designating how your bequest will be used please contact (or have your professional advisor contact) Karen Fullerton, Founder/President, at 336-306-6861 or [karen@sergeifoundation.org](mailto:karen@sergeifoundation.org).