

LJI Legacy Society Confidential Intention and New Member Information Form

Making a bequest in your will or living trust to La Jolla Institute for Immunology (LJI) will create a lasting investment of your legacy in our scientific research, focusing on Life Without Disease. If you have made plans to include us in your estate, we would be pleased and honored to recognize you as a part of our family of supporters. By completing this confidential form, your plans and preferences will be noted. The information below will help us to keep you informed about membership updates, events, and news about LJI and our research. In addition, your input will also help us make your experience as a Legacy Society member an enjoyable one. Thank you for your generosity and time!

1. Donor Information:

Name(s): _____

Address: _____

City: _____ State: _____ Zip: _____

Home phone: _____ Cell phone(s): _____

Email address(es): _____

Birthday(s) (optional): _____

2. Planned Gift Type:

- Bequest in your Will or Living Trust (circle one)
 Charitable Gift Annuity
 Charitable Remainder Trust
 Beneficiary of Life Insurance Policy
 Beneficiary of Retirement Plan Asset (e.g. IRA, 401(k), 403(b))
 Other: _____

Is this gift contingent on another beneficiary surviving you? Yes or No (*circle one*)

Estimated amount or percentage \$ _____ or _____ %

Please indicate how you would like LJI to use your gift:

- Area of Greatest Need
 Other: _____

Signature(s): _____ Date: _____

Signature(s): _____ Date: _____

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3. Donor Recognition:

We would like to recognize the generosity of your intention to honor LJI with a bequest or other planned gift (the details of your gift will remain strictly confidential). Please let us know how you would like to be recognized:

- Please list my/our name I/we wish to be listed as Anonymous

Would you be willing to share why you have decided to give to LJI? If yes, we would love to briefly speak with you and write a short “donor story” to memorialize your gift.

- Yes, I/we would like to share my/our story with others
 No, I/we prefer to keep my/our story private

4. Donor Involvement

Do you have any ideas for future LJI events, e.g. topics, speakers, locations of events?

If you know someone who might be interested in supporting LJI, please consider introducing us to them or inviting them to future events. If you include their contact information below, we can mail them an informational packet.

Name: _____ Phone: _____

Address: _____ Email: _____

*La Jolla Institute for Immunology is a 501(c)3 not-for-profit organization.
Our federal tax ID number is 33-0328688. Your information is kept strictly confidential.
Please return this form to the address below.*

*La Jolla Institute for Immunology
Attn: Kelsey Dale
9420 Athena Circle
La Jolla, CA 92037*