



Legacy Planning

with **airo.**

Please complete all that apply to your plan and/or your spouse's/partner's plans for the benefit of AIRO. This information will help ensure that your intentions are implemented to your desires. Completion of this form in no way obligates you to make a bequest or beneficiary designation to AIRO.

NAME: _____ Date of Birth: / /

MONTH DAY YEAR

SPOUSE (if applicable): _____ Date of Birth: / /

MONTH DAY YEAR

ADDRESS: _____

CITY: _____ State: _____ ZIP: _____

PHONE: () _____ Email: _____

YOU:

Bequest: Will Revocable Living Trust

THE SUM OF: \$ _____

OR % OF MY TOTAL ESTATE FOR AIRO: % _____

OR % OF REMAINDER FOR AIRO: *(After gifts for others)* % _____

ESTIMATED VALUE OF MY GIFT TODAY: \$ _____

SPOUSE:

(If bequest varies from above)

Bequest: Will Revocable Living Trust

THE SUM OF: \$ _____

OR % OF MY TOTAL ESTATE FOR AIRO: % _____

OR % OF REMAINDER FOR AIRO: *(After gifts for others)* % _____

ESTIMATED VALUE OF MY GIFT TODAY: \$ _____

REPRESENTATIVE:

NAME OF ATTORNEY: _____

NAME OF PERSONAL REPRESENTATIVE/TRUSTEE: _____

Beneficiary Designation(s):

	% Designation	Estimated Value	You	Partner
IRA/RETIREMENT PLAN:	<u> </u> %	\$ <u> </u>	<input type="checkbox"/>	<input type="checkbox"/>
CHARITABLE TRUST:	<u> </u> %	\$ <u> </u>	<input type="checkbox"/>	<input type="checkbox"/>
BANK OR BROKERAGE ACCOUNT:	<u> </u> %	\$ <u> </u>	<input type="checkbox"/>	<input type="checkbox"/>
CHARITABLE GIFT ANNUITY:	<u> </u> %	\$ <u> </u>	<input type="checkbox"/>	<input type="checkbox"/>
BENEFICIARY DEED OF ESTATE:	<u> </u> %	\$ <u> </u>	<input type="checkbox"/>	<input type="checkbox"/>
LIFE INSURANCE POLICY:	<u> </u> %	\$ <u> </u>	<input type="checkbox"/>	<input type="checkbox"/>
DONOR ADVISED FUND:	<u> </u> %	\$ <u> </u>	<input type="checkbox"/>	<input type="checkbox"/>

COMPANY WHERE ASSETS ARE HELD: _____

SIGNATURE: _____

DATE: / /

MONTH DAY YEAR

SIGNATURE: _____

DATE: / /

MONTH DAY YEAR

If needed, here is some helpful language to add into your will that ensures your gift goes where you intend it to.

“ I [name], of [city, state ZIP], bequeath the sum of \$___ or ___ percent of my estate to AIRO, a nonprofit organization with a business address of 6800 Indiana Ave, Ste 245, Riverside, CA 92506 and a tax identification number of 46-1323254 for its unrestricted use and purpose. ”

