



AMERICAN ACADEMY™  
OF OPHTHALMOLOGY  
Protecting Sight. Empowering Lives.

## The Legacy Society – Planned Gift Intention

Thank you for including the Academy in your bequest plans. Your legacy gift is a commitment to the our shared mission to protect sight and empower lives through educational, quality of care and service programs.

This form is for informational purposes only and is in no way binding on you or your estate. Any information you share will be kept in the strictest of confidence unless you direct otherwise.

☐ YES, I have included the Academy and/or the Foundation in my estate plan in the following manner:

- |  |  |
|--|--|
| <input type="checkbox"/> Bequest in Will or Trust        | <input type="checkbox"/> Beneficiary of Retirement Plan Assets                     |
| <input type="checkbox"/> Beneficiary of Insurance Policy | <input type="checkbox"/> Remainder Beneficiary of Charitable Trust or Gift Annuity |
| <input type="checkbox"/> Other _____                     |  |

Name (print clearly): \_\_\_\_\_

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

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

Phone: \_\_\_\_\_ E-mail: \_\_\_\_\_

Approximate value of gift (optional): \_\_\_\_\_

I would like my bequest gift to be designated to the following area(s):

- |  |  |
|--|--|
| <input type="checkbox"/> Ophthalmic Education  | <input type="checkbox"/> Where Needed Most |
| <input type="checkbox"/> Global Outreach       | <input type="checkbox"/> EyeCare America®  |
| <input type="checkbox"/> The Museum of Vision® | <input type="checkbox"/> Other _____       |

Please list my/our name(s) on recognition materials as follows:

\_\_\_\_\_

☐ I would like my gift to be anonymous

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

### The Legacy Society

In recognition of your generosity and bequest intention, you are invited to become an esteemed member of The Legacy Society. Members are recognized in various ways including:

- Invitation to the Foundation's annual donor reception and other special events
- Yearly acknowledgement in the Foundation's annual report, on the Foundation website and on the donor wall at the annual meeting
- Personalized support and guidance from Foundation staff

If you have questions or need assistance, contact Todd Lyckberg at 415.447.0361 or tlyckberg@aao.org.