

PLANNED GIFT INTENTION
THE CAL STATE EAST BAY HERITAGE SOCIETY

The Cal State East Bay Heritage Society is an honorary society of donors who have chosen to support California State University, East Bay, through legacy gifts. Members of the Cal State East Bay Heritage Society share the common philanthropic objectives of supporting the university's mission, goals and future planning.

- I/We have included Cal State East Bay in my/our will or living trust
- I/We have established an income-producing gift plan for the benefit of Cal State East Bay (gift annuity, charitable trust, pooled income fund gift)
- I/We have named Cal State East Bay as a beneficiary of my/our life insurance or retirement assets
- I/We have made other estate provisions naming Cal State East Bay as the beneficiary

The approximate amount of my gift to Cal State East Bay is \$ _____ from my/our will or trust, or the gift is % _____ of my estate, which I estimate to be \$ _____

Please designate my gift for the following purpose(s):

- I/We are providing, or will provide, a copy of the relevant page(s) of the legal document(s) that directs my/our gift to the Cal State East Bay Educational Foundation.

My/our attorney is: _____
NAME ADDRESS PHONE

NAMES (Include the name of your spouse/partner if this is a joint gift)

HOME ADDRESS CITY/STATE ZIP CODE

PREFERRED PHONE PREFERRED EMAIL

- I/We would be pleased to be included in the Cal State East Bay Heritage Society. Member list will include first and last name, e.g. John Doe or John and Jane Doe.
- I/We prefer for my/our gift to remain anonymous.

Signature _____ Date of Birth _____ Date _____

Signature _____ Date of Birth _____ Date _____

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Cal State East Bay Educational Foundation

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csueblegacy.org

This form expresses my/our present plans and is subject to revocation or modification at any time. Completed form is not legally binding on my/our estate. Terms and estimated value will remain confidential.