



IT'S YOUR LEGACY. EXPLORE IT.

DECLARATION OF INTENT FOR ESTATE GIFT

I/we have provided support for the mission and goals of California Polytechnic State University through a provision in my/our estate plans, and with this letter we are informing Cal Poly of our plans. I/we understand that this future commitment can be revoked or modified by me/us at any time.

NAME

NAME

ADDRESS, CITY, STATE, ZIP

PHONE (HOME/CELL)

(BUSINESS)

EMAIL

I/we have made a provision to leave a legacy to Cal Poly through my/our:

WILL

RETIREMENT PLAN OR IRA

OTHER _____

LIVING TRUST

LIFE INSURANCE POLICY

I/we wish to inform Cal Poly, for long-term planning purposes only, that the current value of my/our future gift is \$ _____. (This amount is kept confidential; if your gift is a percentage of your estate, please indicate the approximate value.) I/we understand that by stating an amount, my/our estate is not legally bound by this statement and that I/we may choose to add, subtract or revoke this bequest at any time, at my/our sole discretion.

This commitment is to be used for:

The priority needs of California Polytechnic State University

The priority needs of _____
(COLLEGE/UNIT/DEPARTMENT/PROGRAM)

To create a named endowment (please specify): _____

Other _____

GIFT RECOGNITION (CHOOSE ONE)

- Please include me/us, without disclosure of amount, in The Cal Poly Legacy Club. I/We would like my/our name(s) to appear as follows:

NAME(S)–PLEASE PRINT

- Please include me/us in the Cal Poly Green and Gold Society recognizing me/us at the corresponding giving level.
- I/we do not want my/our names published and wish to remain anonymous in perpetuity.
- I/we do not want my/our names published and wish to remain anonymous during our lifetime(s).

DATE	SIGNATURE	BIRTHDATE
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DATE	SIGNATURE	BIRTHDATE
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Please return this form along with a copy of the portion of your estate plan that references your gift to Cal Poly's Office of Gift Planning.

The California Polytechnic State University Foundation is a 501(c)(3) tax-exempt public charitable organization that manages private funds to advance the mission of California Polytechnic State University. The Cal Poly Foundation reinvests five percent of all gifts it receives to assist with the expenses of raising and administering private support for Cal Poly. The foundation's legal/corporate name is the California Polytechnic State University Foundation and its federal tax identification number is 20-4927897.



CONTACT US

OFFICE OF GIFT PLANNING

Cal Poly
San Luis Obispo, CA 93407-0444

Toll Free 800-549-2666

Phone 805-756-7125

Fax 805-756-2711

Email plannedgiving@calpoly.edu

Web plannedgiving.calpoly.edu