



CAL POLY

*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.

## DONOR INFORMATION

NAME

NAME

ADDRESS, CITY, STATE, ZIP

PHONE (HOME/CELL)

PHONE (BUSINESS)

EMAIL(S)

## TYPE OF GIFT

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

- ☐ WILL ☐ RETIREMENT PLAN OR IRA  
☐ LIVING TRUST ☐ LIFE INSURANCE POLICY  
☐ OTHER \_\_\_\_\_

## ESTIMATED GIFT VALUE

The estimated current value of my/our future gift to California Polytechnic State University is:

\$ \_\_\_\_\_

## GIFT DESIGNATION

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

☐ Please include me/us, without disclosure of amount, in the Cal Poly 1901 Legacy Society. I/We would like my/our name(s) to appear as follows:

\_\_\_\_\_  
PLEASE PRINT NAME(S)

- ☐ Please include me/us in the Green & Gold Society, Cal Poly's leading lifetime donor recognition society.  
☐ 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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