

IT'S YOUR LEGACY. EXPLORE IT.

SAMPLE BEQUEST LANGUAGE

Thank you for considering a gift to Cal Poly in your estate plans. Planned gifts provide the university with vital resources for maintaining its Learn by Doing tradition of excellence and we appreciate that you are interested in Cal Poly's continued success. Below is sample bequest language that you may share with your attorney to include in your will or living trust.

OUTRIGHT GIFT

I give, devise and bequeath to the California Polytechnic State University Foundation, a nonprofit public benefit corporation located in San Luis Obispo, California, the sum of \$_____ (or property herein described), for the benefit of (specify college, department, unit or program) at California Polytechnic State University.

NAMED ENDOWMENT

I give, devise and bequeath to the California Polytechnic State University Foundation, a nonprofit public benefit corporation located in San Luis Obispo, California, the sum of \$_____ (or property herein described), to establish a permanent endowment called the (insert donor's name) endowment. This fund shall be held in perpetuity and only the income from this endowment will be made available to provide ongoing support to the (specify college, department, unit or program) at California Polytechnic State University.

For more information or to discuss how you may direct your gift to a specific college, department or program, please contact the 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.



CAL POLY

Office of Gift Planning

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CAL POLY
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UNIVERSITY DEVELOPMENT
& ALUMNI ENGAGEMENT