

THE POWER OF  
**DOING**

The Campaign for  
Learn by Doing



## CAL POLY

Office of Gift Planning

### CONTACT US

San Luis Obispo, CA  
93407-0444

800-549-2666 | 805-756-7125  
plannedgiving@calpoly.edu  
plannedgiving.calpoly.edu

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)

(BUSINESS)

EMAIL

### TYPE OF GIFT

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

### 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: \_\_\_\_\_



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## 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:

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NAME(S) — PLEASE PRINT

- 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).

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DATE                      SIGNATURE                      BIRTHDATE

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DATE                      SIGNATURE                      BIRTHDATE

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 5% 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.

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