



**The Legacy Society
at California State University, Monterey Bay**

The Legacy Society at California State University, Monterey Bay is an honorary society of alumni, faculty, staff and friends who have chosen to support California State University, Monterey Bay, through legacy gifts. Leaving a gift to CSUMB through an estate or life income plan does more than support student excellence in the future. It sets up a lasting legacy of your personal values and is a statement of your vision for the future.

The CSUMB Legacy Society specifically honors donors who make estate or life income gifts. The Society provides us an opportunity to personally and publicly acknowledge our estate and life income donors. You may also request to remain anonymous. Through recognition activities and special campus events, CSUMB acknowledges and celebrates the lives and philanthropic ideals expressed by our donors.

Donors are admitted to the Legacy Society when they have confirmed in writing that they have included CSUMB in their estate plans or created a life income gift. Gifts may be through bequests, beneficiary designations from life insurance or retirement plans, a charitable trust or a charitable gift annuity, among others. We welcome the opportunity to show our gratitude to those who are helping to reaffirm CSUMB's promise to our students and the community.

I/we are pleased to join the California State University, Monterey Bay Legacy Society with other legacy benefactors. I/we have provided for a charitable estate gift for Cal State University Monterey Bay through the following vehicle(s):

- _____ Bequest through my/our will or living trust
- _____ A charitable gift annuity, trust, or other life income-producing gift plan
- _____ An IRA or other retirement plan
- _____ I have made other estate provisions naming CSUMB as a beneficiary (please briefly describe):

My/our gift is intended to be used as follows:

To ensure Cal State University Monterey Bay is able to use your gift as stated, we encourage you to attach copies of the appropriate sections of your estate documents as part of this confidential record. As an alternative, you may provide a letter from your financial or legal advisor describing your future gift to the university.

The estimated value of my/our gift (CONFIDENTIAL) is: \$_____. Including this information will help the University plan for the future.

After completing both sides of the form, please forward to the attention of _____ or mail to the address below.

Donor Name(s): _____

Address: _____

Phone: _____ **Cell:** _____

Email: _____

_____ I/We would be pleased to be included in the CSUMB Legacy Society honor rolls. The terms of my/our gift will remain confidential. The name(s) will appear as listed above **or indicate how name/s should appear here:**

_____ I/We prefer to remain anonymous, but will accept other associated benefits extended to Legacy Society members.

Signature(s): _____ **Date:** _____

_____ **Date:** _____

Thank you for your thoughtful gift in support of Cal State Monterey Bay.

OFFICE USE: Please print the name(s) of the donors: _____