

The Legacy Society at California State University, Monterey Bay

Legacy Gift Intent Form

The Legacy Society at California State University, Monterey Bay is an honorary society of alumni, faculty, staff and friends who have chosen to support CSUMB through estate or life income gifts. Leaving a legacy gift to CSUMB 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.

If you have made, or intend to make, a legacy gift to CSUMB please complete this confidential, non-binding form and return it to: California State University, Monterey Bay, University Development, Alumni and Visitors Center – Bldg. 97, 100 Campus Center Seaside, CA 93955-8001.

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 California 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

Other (please describe): _____

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

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

Legacy Society Membership Information

Donor Name(s): _____ Birthdate(s): _____

Address: _____

Phone: _____ Cell: _____

Email: _____

Recognition Preferences

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.

Signature: _____ **Date:** _____

Signature: _____ **Date:** _____

Thank you for your support! Questions? Call (831) 582-5070; email rparadis@csumb.edu; or visit csumbgift.org