



California State University, Fullerton  
Office of Planned Giving

**My Estate Includes California State University, Fullerton**

The information in this form is considered highly confidential by the Office of Planned Giving and protected by University policy. The information you provide will be used only to assure your gift is directed towards your desired purpose and to provide recognition of your gift if you choose.

Name(s) (please print) \_\_\_\_\_ Recognition Name (if different) \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_ E-Mail \_\_\_\_\_

CSUF Class Year(s) (if applicable) \_\_\_\_\_ Birth Date(s) \_\_\_\_\_

**THE GIFT**

- Bequest from will or trust
- Charitable Gift Annuity
- Beneficiary of IRA, life insurance or other retirement plan
- Other (please describe) \_\_\_\_\_

- Charitable Remainder Trust
- Real Estate

The *estimated* value of this gift *as of today's date* is \$ \_\_\_\_\_

- Please use the gift wherever it is most needed.
- Please direct the gift to the following campus need: \_\_\_\_\_  
(attach additional sheets if necessary)

**RECOGNITION**

I would like to be listed as a member of the Ontiveros Society (the campus recognition society for donors who make estate gifts). Please include my/our name(s) without disclosure of amount, in the CSUF Ontiveros Society and other campus recognition (including post-mortem recognition) as shown above in "recognition name".

I would like this gift to remain anonymous and confidential. Please do not include me in the Ontiveros Society mailings or in other campus recognition now or in the future.

This statement is an expression of my current plans and may be revoked. I understand that his statement is not legally binding on my estate and that this information is solely for University use to facilitate proper application of my gift at the time it arrives.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date