



California State University, Fullerton
Office of Planned Giving

My Estate Includes Cal State Fullerton

The information in this form is considered 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
This gift is: Revocable Irrevocable
Beneficiary of IRA, life insurance or other retirement plan
Other (please describe)
Charitable Gift Annuity
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 letter of intent or additional sheets if necessary)

RECOGNITION

- I would like to be listed as a member of the Ontiveros Legacy Society (our recognition society for donors who make estate gifts). Please include my/our name(s) without disclosure of amount, in the CSUF Ontiveros Legacy 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 Legacy 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 this statement is not legally binding on my estate and this information is solely for University use to facilitate proper application of my gift at the time it arrives. I understand all planned and deferred gifts are subject to the administrative fee in effect at the time the gift arrives.

Signature Date

Signature Date