

Instructions for My Estate Gift to CSULB

These instructions declare my/our charitable intent to support Long Beach State University. I/we understand that this information is confidential and the University does not consider it a pledge of funds. I/we may modify or revoke the plans at any time and will notify the University in writing if my/our plans change. I/we understand the estimated value stated here may change before the gift arrives and that this information will be used only to assure the estate gift is used according to my/our wishes when the funds arrive many years from now. I/we understand that the Legacy Planning team at CSULB may contact us from time to time about our plan for their files even if we indicate we do not wish to receive campus recognition.

Name(s) (please print)

Address

Phone

Email

CSULB class year(s) if applicable

Birth Date(s)

THE GIFT

- I/we intend to designate CSULB as a beneficiary in our estate plan. I/we will let you know the details when complete.
- I/we have already designated CSULB as a revocable beneficiary in my/our:
 - Will/Living Trust
 - IRA or Other Retirement Plan
 - Life Insurance
 - Other (please describe):

If it unexpectedly arrived today, the estimated value of this potential gift is \$ _____

Is this amount specified in your plan? Yes No

If no, what percent does this value represent? _____ %

WHEN THE GIFT ARRIVES

- Please use the gift wherever it is most needed.
- Please use the gift at the discretion of the following College Dean and Department Chair or Program Director:

When my gift arrives, I would like my gift to set up an endowment. Please contact me to do the paperwork.

I would like my gift to go to a current endowment: _____

If you need assistance or clarification, the name and contact info for my attorney, trustee, tax advisor or financial advisor is:

RECOGNITION (NOTE: you may change your choice at any time by notifying the Gift Planning Office in writing)

- I/we agree to be recognized in CSULB's 49er Legacy Society, a campus recognition group and receive invitations to campus events, publications, and publishing my/our name(s) without disclosing the gift amount.
- Please do not include me/us in the 49er Legacy Society or publish my/our name(s) now or when the gift arrives.

Signature(s)

Date

PLEASE RETURN BY MAIL OR EMAIL

MAIL:
CSULB Legacy Planning Office
1250 Bellflower Blvd. BH 387
Long Beach, CA 90840-0116

EMAIL:
Legacyplanning@csulb.edu

PHONE:
(562) 985-5489