

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 Gift 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 set up an endowment when my gift arrives (see page 2 for additional estate gift instructions).
- 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:

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 the CSULB Legacy Society, a campus recognition group. This includes invitations to campus events, receiving publications, and publishing my/our name(s) without disclosing the gift amount.
- Please do not include me/us in the CSULB Legacy Society or publish my/our name(s) now or when the gift arrives.

Signature

Date

Signature

Date

The Legacy Society

ADDITIONAL ESTATE GIFT INSTRUCTIONS

If the value of my/our future gift meets the minimum requirements, I/we would like the CSULB 49er Board of Directors to establish an endowment according to these instructions. I/we understand that the University will administer the gift according to University policies and California law governing endowments and distributions that are in effect at the time the gift arrives.

PROPOSED ENDOWMENT NAME: _____
(You may use your own name(s) or name the endowment after family members, friends, professors, coaches or others)

I/we would like the endowment to support the following College, Department or Program:

I/we understand that the exact use of the funds will depend upon the amount received. If the amount received is sufficient, I/we ask that the funds support the following:

- Endowed Dean or Athletic Director fund (for use at the Dean or Director's discretion)
- Endowed Program or Department fund (for use at the Department Chair, Director or Coach's discretion)
- Endowed faculty or coach position
- Endowed and named program or lecture series
- Endowed faculty and student research or travel fund
- Endowed equipment and technology fund
- Endowed named scholarship.

Please use the following space to describe suggested criteria for use:

- I/we have consulted with the Gift Planning Office staff about the criteria for the proposed endowment.
- I/we have not consulted with the Gift Planning Office staff. Please call.

Signature

Date

Signature

Date

Please return by mail, fax or email to
CSULB Gift Planning Office
1250 Bellflower Blvd. BH 387
Long Beach, CA 90840-0116
Email: Susan.Berkman@csulb.edu

QUESTIONS?
Call Susan Berkman, J.D. at (562) 985-5122
or visit www.csulbgiftplanning.org