

The Legacy Society

Instructions for My Estate Gift to CSULB

THANK YOU for including CSULB in your estate plan! The information in this form is confidential and used only to assure your wishes are honored out when the gift arrives many years from now. The form also allows you to advise us whether you would like recognition for your gift during your lifetime for including the campus in your estate plan.

Name(s) (please print)

Address

Phone

Email

CSULB class year(s) if applicable

Birth Date(s)

THE GIFT

- I/we have designated CSULB as a revocable beneficiary in my/our will or living trust.
- I/we have designated CSULB as a beneficiary of my/our IRA(s), 401(k)s, pension(s) or life insurance policy
- I/we have designated a gift to CSULB in another type of instrument (e.g., CSULB is a revocable remainderman in my charitable trust). Please describe:

The estimated value of this gift if it unexpectedly arrived today is \$

Is this amount specified in your plan? Yes No

If no, what percent of the residual does this value represent? \$ _____

WHEN THE GIFT ARRIVES

- Please set up an endowment when my gift arrives (see additional estate instructions attached).
- 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 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.

This states my/our current plans that may be altered due to unforeseeable circumstances. I/we will notify the University if my/our designation to the University changes. I/we understand that that the information will be used by the University solely to facilitate proper administration of the gift at the time it arrives and to guide recognition activities during my/our lifetime(s).

Signature

Date

Signature

Date

ADDITIONAL GIFT INSTRUCTIONS

If the value of my/our gift meets the minimum requirements when it arrives in the future, I/we would like the CSULB 49er Board of Directors to establish an endowment (a permanent fund) 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
FAX: (562) 985-5362 ▪ Email: Susan.Berkman@csulb.edu

QUESTIONS?

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