

**THE HERITAGE SOCIETY**  
**Declaration of Charitable Intent**

Name(s): \_\_\_\_\_

Address: \_\_\_\_\_

Home Phone/Cell Phone: \_\_\_\_\_

Email Address: \_\_\_\_\_

Birthdate(s): \_\_\_\_\_

Cal State LA Degree(s)/Year(s): \_\_\_\_\_

**CHARITABLE GIFT INTENTION**

I/we desire to make the following gift provision for the benefit of California State University, Los Angeles. **The estimated value of this gift as of today's date is \$\_\_\_\_\_.** However, by stating an amount, I/we understand that my/our estate is not legally bound by this statement and can revoke or modify it at any time as this document is not considered a pledge of support (but requested for strategic planning and projection purposes). I/we will make every effort to contact Cal State LA in writing should I make such revocation or modification of the gift intention indicated below.

- Please use this gift for the University's highest priority need.
- Please direct this gift to the following campus college or program: \_\_\_\_\_
- Please direct this gift to create an endowment (\$25,000 minimum gift required).
  
- Cal State LA is named as a revocable beneficiary (gift recipient) in my:
  - Will
  - Life Insurance Policy
  - Appreciated Assets (jewelry, stock, etc.)
  - Living Trust
  - Bank Account
  - IRA or Retirement Plan
  - Real Estate
  
- Cal State LA will receive a gift from my estate through my:
  - Charitable Remainder Trust
  - Charitable Lead Trust
  - Other: \_\_\_\_\_

**RECOGNITION**

Unless you indicate below, all charitable gift intentions will be honored with recognition by indicating that you are a member of The Heritage Society of Cal State LA (in Cal State LA listings and publications) **without gift amount**. In addition, you will be invited to a recognition event and may receive invitations to selected special events.

- I/we would like this gift to remain anonymous and confidential.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

***Please return this form to The Office of Planned Giving at Cal State LA by mail, fax or email. Thank you for your support.***

**Office of Planned Giving**  
5151 State University Drive  
Administration 809  
Los Angeles, CA 90032-8502  
[www.plannedgiving.calstatela.edu](http://www.plannedgiving.calstatela.edu)

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