



Estate Gift Intent

Legacy Society members make their plans known to us in advance with as much detail as they like. Making your wishes clear to Santa Monica College Foundation in advance helps ensure your gift is applied as you intend and that you are recognized or remain anonymous according to your wishes. Being able to track anonymously the overall number of generous people who have made a provision for Santa Monica College Foundation in their estate plans helps us attract additional donors. This document is non-binding. Your information will be kept strictly confidential and we will recognize your legacy gift only with your approval.

Yes! I have included Santa Monica College Foundation in my estate plan.

Name _____

Address _____

City, State, Zip _____

Phone _____ Email _____

Name of Trustee or Executor _____

Address _____

City, State, Zip _____

Phone _____ Email _____

IMPORTANT:

Please be sure to use our complete official name, Santa Monica College Foundation, in your estate planning documents or when designating a beneficiary for IRA, investment accounts or other assets. Santa Monica College Foundation is a separate entity from Santa Monica College. We are an IRS designated nonprofit 501(c)(3) ID number, 95-6047779.

Type of gift:

- Will/Living Trust
- IRA/Retirement Account*
- Bank, Brokerage or Other Financial Account*
- Privately held stock
- Life Insurance Policy
- Charitable Trust
- Other (please specify) _____

** Please note that some firms and financial institutions do not contact beneficiaries when the account holder is deceased. Therefore, if you designate Santa Monica College Foundation as a beneficiary of any account not covered by your will, you must notify us so we are aware of the designation in order to claim the gift when the time comes.*

My future gift amount:

- Is a percentage of my estate. The estimated amount of my gift is \$ _____
- Is in the specific amount of \$ _____
- I wish to keep the amount of my gift confidential.

My future gift is designated to support:

- The priority needs at the time it is received.
- Endowment Fund invested to create earnings that support the foundation's mission and greatest needs going forward.
- A specific program or department _____.
- Scholarship aid generally.
- A specific/named scholarship, _____. If this scholarship and its criteria have not already been established, please complete an annual or endowed scholarship set up form and provide it with this document.

How would you like to be recognized? Check all that apply.

- Please include me/us, without disclosure of amount, in the Santa Monica College Foundation Legacy Society during my/our lifetime(s).
- Please include me/us in the Legacy Society listings at the corresponding giving level.
- After my/our lifetime(s), I/we wish to remain anonymous.
- After my/our lifetime(s), I/we would like to be included in publications with the aim of inspiring others to make similar gifts.

Name for Legacy Society listings (if not anonymous) _____

Thank you again for your continued support for Santa Monica College students' achievement of their dreams via your donations to Santa Monica College Foundation.

Santa Monica College Foundation and its employees do not provide tax or legal advice. You should consult with your chosen legal and financial advisors. It is helpful, but not mandatory, for Santa Monica College Foundation to receive a copy of the relevant section(s) of your will or other estate planning documents. Please attach these documents if possible.

I understand that by informing you of my intentions, my/our estate is not legally bound by this statement and that I/we may choose to change my estate plan and will at any time.

Printed Name _____

Signature _____

Date _____ Birthday (mo/year) _____

Printed Name (spouse) _____

Signature _____

Date _____ Birthday (mo/year) _____

Please return this form to: Santa Monica College Foundation, 1900 Pico Blvd, Santa Monica, CA 90405

If you have any questions, please feel free to call us at (310) 434-4215 or email foundation@smc.edu.