



LEGACY GIFT CONFIRMATION FORM

As of _____ I/we have included Cabrillo National Monument Foundation (CNMF) in my/our estate plan to preserve and protect the protect the park for future generations. ***It is my/our intent to leave a legacy gift to CNMF as follows:***

- Will Living trust Retirement plan Life insurance policy
 Charitable Remainder Trust Other _____

Optional: I/We estimate the current value of my/our gift is \$ _____
(If your gift is a percentage of your estate, please indicate the approximate value of that percentage)

I/We understand that, by stating an amount, my/our estate is not legally bound by this statement, and I/we may choose to add, subtract, or revoke this bequest at any time, at my/our sole discretion.

This gift is to be used by Cabrillo National Monument Foundation as an:

- unrestricted gift as deemed appropriate by the Board of Trustees
 restricted to the following purpose/program: _____
 I/we give my/our consent to have my/our name(s) acknowledged as legacy donors on Cabrillo National Monument Foundation's website and other publications **-or-**
 I/we wish to remain anonymous concerning this bequest

Name(s) _____

Address _____

City _____ State/Zip _____

Telephone _____ Email _____

Signature _____ Date _____

I/we understand this information will be held in the strictest confidence and used by Cabrillo National Monument Foundation only to keep track of planned gift expectancies. This declaration of intent is not a binding legal obligation, and I/we may choose to add, subtract, or revoke this bequest at any time, at my/our sole discretion.

Thank you for your generous support of our mission!



Some gifts make an impact today. A legacy gift, or bequest, can leave a lasting impact by ensuring that Cabrillo National Monument Foundation may continue to support the interpretive, cultural, historical, scientific and educational programs and activities at Cabrillo National Monument.

What is a Bequest? A bequest is a section of your will or living trust that directs a gift from your estate to the person or institution of your choice after you die. Bequests may be used to provide gifts of money, real estate, stocks, or even works of art or jewelry.

Bequest Language

General Bequest: "I give to Cabrillo National Monument Foundation , a nonprofit corporation organized and existing under the laws of the State of California, with the Tax ID # 95-1884723 and the current business address of P.O. Box 6349, San Diego, CA 92166-0349 the sum of \$_____ (or substitute in "all of my interest in the following described property") to be used in furtherance of its exempt charitable purposes."

Residual or Proportional Bequest: Substitute in "X percent or all of the residue of my estate."

Contingent bequests: can be specified if you wish to name *Cabrillo National Monument Foundation* as beneficiary if any or all other beneficiaries are deceased.

Other Legacy Gifts:

If you have an IRA, appreciated stock, or real estate, our experts can also assist you in making a tax advantaged gift. Call/Email Emily Moore, Executive Director – emily@cnmf.org or 619-523-4255

The information provided here is not intended to be legal or tax advice; please seek your own legal and financial counsel. It is always advisable to consult with a qualified estate planning attorney when drafting your will to ensure your wishes for family and our nonprofit are properly documented.