



STATEMENT OF INTENT
Bequest Provision

Thank you for including Cal Poly Pomona (CPP) in your estate plans. To aid us in properly recognizing your gift intention, we ask that you provide the following summary information. Please also **attach any documents** that further describe the nature of your arrangements.

MY CURRENT INTENTION IS TO INCLUDE CAL POLY POMONA IN MY ESTATE PLANS AS FOLLOWS:

- A. I have named Cal Poly Pomona as a revocable beneficiary through my:
- Will or Living Trust.
- Charitable Trust. (Type of Trust: _____)
- Retirement Plan. (Administrator: _____)
- Life Insurance Policy. (Issuer: _____)
- Bank/Investment Account. (Institution: _____)
B. The current estimated value of this gift intention is \$_____, based on:
- A specified dollar amount noted in the documentation.
- _____% of the total assets, currently valued \$_____.

I INTEND FOR MY GIFT TO CAL POLY POMONA TO BE USED AS FOLLOWS:

- Unrestricted for Greatest Need
- Restricted to _____
Other instructions/comments: _____

This commitment is revocable and is not legally binding on my estate; therefore I retain the right to change my designation of CPP as a beneficiary, the purpose of my CPP bequest, and the portion and amount of my estate that will go to CPP. I agree, however, to inform CPP of any change in my intentions toward the University and/or if the value of my estate's potential donation significantly increases or decreases.

Signature 1: _____ Date: _____
Signature 2: _____ Date: _____
(if applicable)

Cal Poly Pomona is pleased to honor our planned giving donors with membership in the Kellogg Voorhis Legacy Society.

- I agree to be listed as a member of the Kellogg Voorhis Legacy Society.
- I prefer that my membership be anonymous.

Name(s): _____
CPP relationship: _____ If alumnus/a, Class Year(s): _____
Address: _____ City: _____ State: _____ Zip: _____
E-mail: _____ Date of birth (optional): _____

Please return this form to Cal Poly Pomona, Office of Planned Giving
Mail: Cal Poly Pomona, PO Box 3121, Pomona, CA 91769 | E-mail: vjfraumeni@cpp.edu

Cal Poly Pomona Philanthropic Foundation, is a 501(c)(3) non-profit California corporation.
As with any decision involving your assets, we urge you to seek the advice of your professional counsel when considering a gift to CPP.