

**Cupertino Rotary Endowment Foundation**  
**Legacy Society Membership Form**



Name \_\_\_\_\_

Address \_\_\_\_\_

Day Phone \_\_\_\_\_ Eve Phone \_\_\_\_\_

Birth Date \_\_\_\_\_ Email \_\_\_\_\_

*I have made a legacy gift to Cupertino Rotary Endowment Foundation as indicated below:*

- Will (Please designate: Cupertino Rotary Endowment Foundation)
- Life Insurance Policy or Retirement Plan Beneficiary Designation
- Trust in which Cupertino Rotary Endowment Foundation is named as a beneficiary. Please indicate when the Foundation's interest will take effect. (Example: "Income to my spouse, then principal to Cupertino Rotary Endowment Foundation")
- Deferred Gift (i.e. Charitable Gift Annuity, Pooled Income Fund, Charitable Remainder Trust, Charitable Lead Trust, etc.) Contact Pat Jackson, at 408-253-9944 to discuss.
- Other (please describe) \_\_\_\_\_

Estimated amount of gift (optional): \$\_\_\_\_\_ or \_\_\_\_\_% of estate or policy or account.

Optional: enclose a copy of the pertinent section of your document mentioning Cupertino Rotary Endowment Foundation as a beneficiary. We will retain this in our confidential files as a record of your intention.

**Congratulations. Your gift qualifies you for charter membership in our Legacy Society. We are honored to recognize you in our Legacy Society materials unless you indicate otherwise.**

- Please list my/our names as follows: \_\_\_\_\_
- I/we wish to remain anonymous.
- Please have someone call me about my estate plans and how I might include CREF.

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SIGNATURE

DATE