



United Way
Monterey County

UNITED WAY MONTEREY COUNTY LETTER OF INTENT

I/we believe in improving lives and fight for the health, housing, early care & education, and financial stability of every person in our community. I/we intend to make an impact in my/our community for generations to come by affirming that I/we have made or intend to make a lasting gift to United Way Monterey County by joining the Legacy Circle.

Name: _____

Date of Birth(s): _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____

E-mail: _____

Donor Signature(s): _____ Relationship: _____ Date: _____

Donor Signature(s): _____ Relationship: _____ Date: _____

I/WE HAVE MADE OR WILL MAKE THE FOLLOWING GIFT(S) TO UNITED WAY MONTEREY COUNTY:

Bequest in My Will -or- Living Trust

Life insurance designating United Way Monterey County as Beneficiary -or- Owner

Qualified Pension Plan designating United Way Monterey County as a beneficiary

Life Income Gift to benefit me or my family (i.e., Charitable Gift Annuity, Charitable Remainder Trust) during my/our lifetime, then United Way Monterey County

Creation of a Charitable Lead Trust

Retained Life Estate with the ability to continue using the property for the remainder of my/our life, then benefitting United Way Monterey County

An outright gift (please specify): " Cash " Stock " Real Estate

Other Personal Property: _____

Not a legal obligation, and may be changed at donor's discretion.



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Endow our Tocqueville or other annual gift of \$10,000 to ensure its perpetuity for the future

Other Gift of: _____

RECOGNITION

I/We authorize recognition of this gift in United Way Monterey County's publications in the following name/s:

(Please print)

I/We prefer to remain anonymous..

DONOR INTENT

My/Our gift is unrestricted and should be used for charitable purposes as determined by United Way Monterey County.

My/Our gift is restricted to United Way Monterey County endowment fund to be used for the benefit of generations to come, to contribute to sustainable funding, and to perpetuate my support of my community:

(purpose)

I/We would like this gift to be restricted to:

(purpose)

OPTIONAL

It is helpful to United Way Monterey County to know of future expectancies and a general sense of the gifts that have been pledged through the United Way Monterey County Legacy Circle. If you can share the amount you have pledged, please do so here. The terms of your gift can remain confidential.

PLEASE HAVE A REPRESENTATIVE FROM UNITED WAY MONTEREY COUNTY CONTACT ME TO DISCUSS MY GIFT.

Please return to:

United Way Monterey County
60 Garden Court, Suite 350, Monterey, CA 93940
Phone: (831) 372-8026
Tax ID #94-1322169