



CONFIDENTIAL

LEGACY MEMBERSHIP FORM

Thank you for your intention to fulfill your charitable legacy in partnership with the Long Beach Public Library Foundation (LBPLF). We greatly appreciate your expression of support for LBPLF and the future of our libraries.

By completing the information about your legacy gift below, you will help LBPLF plan for the delivery of service in future years. All information provided will remain confidential. In addition, this form will allow us to honor you as a member of LBPLF's **Carnegie49**, the name of its legacy society, with your permission.

This document does not bind you or your estate and all information contained herein will be held in the strictest confidence. LBPLF recognizes that gift plans may change over time, and we hope you will consider notifying us of any relevant changes in your plans.

Name(s): _____

Address: _____

City: _____ State: _____ Zip Code: _____

Phone: _____ Email: _____

Please describe the **nature of your gift**:

- | | |
|--|---|
| <input type="checkbox"/> Bequest: Will or Codicil
(an addition to your Will) | <input type="checkbox"/> Life Insurance Policy or Commercial Annuity |
| <input type="checkbox"/> Revocable "Living" Trust | <input type="checkbox"/> Beneficiary of savings, checking, money market, stock, or another account. |
| <input type="checkbox"/> Charitable Remainder Trust | <input type="checkbox"/> Charitable Gift Annuity |
| <input type="checkbox"/> IRA or Other Retirement Account
(if separate from Trust) | <input type="checkbox"/> Other: _____ |

The estimated **total anticipated value** of your estate gift (optional): \$ _____

The estimated value of the gift will remain confidential and will not be published or listed.

This Declaration of Intent is an expression of my/our present plans and is subject to change or modification.

SIGNATURE: _____ DATE: _____

SIGNATURE: _____ DATE: _____

For more information, please contact Veronica Garcia Dávalos, Executive Director/CEO, or Erica Bradley, Deputy Executive Director of Development, at 562-628-2441.

LISTING

LBPLF recognizes that estate planning is a highly personal matter. Only those donors who give permission will have their names recognized in the *annual impact report, website, and other donor listings* as members of the Legacy Society.

- I/We would like others to be encouraged by my/our example, and hereby give permission for our/our first and last name(s) or fund name to be **recognized as follows**:

Not to exceed 32 characters, including punctuation

- I/We would also be **interested in sharing my/our story** on the LPBLF website or in publications.
- I/We would like to remain **anonymous** and prefer that my/our name(s) not be published.

SIGNATURE: _____

DATE: _____

SIGNATURE: _____

DATE: _____

Please return this completed form to:

Veronica Garcia Dávalos
Executive Director and CEO
Long Beach Public Library Foundation
200 W. Broadway, Long Beach, CA 90802
Veronica@LBPLfoundation.org

If you are considering making a bequest of a percentage of your estate to the Long Beach Public Library Foundation, we recommend the following language:

I hereby give, devise and bequeath the sum of \$_____ (or an amount equal to _____ percent (____%) of my total estate, determined as of the date of my death) to the Long Beach Public Library Foundation, a nonprofit organization (Federal Tax ID 33-0698704) located at 200 W. Broadway, Long Beach, CA 90802.

For more assistance with your bequest, please reach out to Erica Bradley:
Erica@LBPLfoundation.org or (562) 628-2441 x2.