



STATEMENT OF INTENT
For
Rotary Club of San Jose Foundation

As an indication of my/our support for the Rotary Club of San Jose Foundation, I/we are pleased to report that I/we have made/intend to make a gift or estate provision for the benefit of the RCSJF.

My/our intention is indicated below:

- | | |
|-------------------------------------|----------------------------------|
| _____ Bequest (will or trust) | _____ Charitable Gift Annuity |
| _____ Gift of Appreciated Property | _____ Charitable Remainder Trust |
| _____ IRA (other tax deferred fund) | _____ Life Insurance Designation |
| _____ Other: _____ | |

General description of gift provision (e.g. percentage, estimated present value, type and how structured in will or trust)

It is understood that values are subject to change, but I/we estimate the present value of my/our provision to be approximately \$_____

It is understood that these statements and estimates are offered solely to assist the Rotary Club of San Jose Foundation record and project future financial support and gift expectancies. **ALL INFORMATION REMAINS STRICTLY CONFIDENTIAL**

I would like this planned gift to be RECOGNIZED/REMAIN ANONYMOUS (circle one)

Name: _____

Address: _____

Phone/Email Address: _____

Signature of Donor(s): _____ Date: _____

_____ Date: _____