



LETTER OF INTENT FOR ESTATE GIFT



Return to:

California Fire Foundation
Gift Planning
1780 Creekside Oaks Dr.
Sacramento, CA 95833
Phone: 800-890-3213
Fax: 916-921-1106
www.cafirefoundation.org
cafirefoundation@cpf.org

California Fire Foundation is a charitable, non profit 501 (c)(3) organization. Tax ID #68-0118991

I/we desire to provide for the future well-being of the California Fire Foundation through a provision in my/our estate plans, and with this letter we are informing the California Fire Foundation of our plans. I/we understand that this future commitment can be revoked or modified by me/us at any time.

_____		_____	
Name		Name	

Address			

City		State	ZIP

Phone	Fax	E-mail address	

I/we have made a provision to leave a legacy to the California Fire Foundation through my/our:

- Will** **Retirement plan or IRA** **Living Trust** **Life Insurance policy**
 Stock (Please review and complete pages 2-3) **Other***

* We will contact you to further discuss details of your gift.

I/we wish to inform the California Fire Foundation, for long-term planning purposes only, that the current value of my/our future gift is \$_____. (This amount is kept confidential; if your gift is a percentage of your estate, please indicate the approximate value). I/we understand that by stating an amount my/our estate is not legally bound by this statement and I/we may choose to add, subtract or revoke this bequest at any time.

GIFT RECOGNITION (choose one)

- The Foundation may publish my/our names in California Fire Foundation Legacy Society members lists.
 I/we do not want my/our names published.

_____	_____	_____
Date	Name (Print)	Name (Print)
_____	_____	_____
	Name (Signature)	Name (Signature)



GIFT OF STOCK INSTRUCTIONS

THANK YOU FOR YOUR INTEREST IN MAKING A CHARITABLE GIFT TO THE CALIFORNIA FIRE FOUNDATION IN THE FORM OF A STOCK TRANSFER.

Please complete and return the third page of this form to receive your tax-acknowledgement.

For stock held in brokerage accounts, your broker can assist you in making a gift of stock via a direct transfer to the California Fire Foundation. Giving a gift of publicly traded stock that has increased in value and that you have owned for more than one year may provide better tax benefits than giving cash. Your charitable income tax deduction is equal to the fair market value of the stock and you avoid paying the capital gains tax on any increase in the current value over the original cost of the stock. You may also save on brokerage fees because you are transferring ownership rather than selling the stock.

If you would like to donate stock to the California Fire Foundation (tax ID# 68-0118991), please note the following:

- Brokerage House: Morgan Stanley
- Account Name: California Fire Foundation
- Account Number: 142-029278-003
- California Fire Foundation Contact: Hedi Jalon
- California Fire Foundation Telephone Number: (916) 641-1707
- DTC Number: 0015
- Reference: Donor Name (Including your name will ensure the gift is properly acknowledged.)

****Please Note:** For mutual fund gifts, or for gifts of stock not held in a brokerage account, please contact the California Fire Foundation with the contact information listed above.**



GIFT OF STOCK FORM



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Please complete the information below to notify the California Fire Foundation of your gift and help ensure it is processed accurately.

DONOR & SECURITIES INFORMATION:

Name & Type of Securities (e.g.: DELL common stock) _____

Security Symbol _____ Number of Shares _____ Transfer Date ____/____/____

Special Instructions _____

Donor Name (Individual, Corporation, Foundation) _____

Donor Street Address _____

Donor City / State / Zip _____

Broker Name _____

Broker Company / City / State _____

Broker Contact / Telephone Number _____

Donor Telephone / Email Address (to be used only if a question arises in the donation process)
(_____) _____ - _____ / _____

Donor Signature _____ Date Signed ____/____/____

Donor Signature _____ Date Signed ____/____/____

NOTE - All account owners must sign this request (e.g. an individual account would require one signature; a Joint Tenants in Common account would require two signatures)

Please consult with your tax advisor before making a charitable donation to any charity.

You may be eligible to increase the power of your donation with employer matching funds. Many employers will match your personal donation. Check with your company for more information on matching gift programs. Employer matching gifts may also be available to you if you are the spouse of an employee, a retired employee, or the spouse/widow/widower of a retiree.

Thank you again for considering California Fire Foundation as the recipient of your charitable gift.