

Planned Gift Confirmation Form

Kern Community Foundation expresses its appreciation for your commitment to support our community's future with a planned gift. Please take a moment to complete this confidential form and return it to us as a confirmation of your intentions:

I/We confirm the following planned gift to Kern Community Foundation:

- Bequest
- Charitable Remainder Trust
- Charitable Gift Annuity
- Pooled Income Fund
- Beneficiary Designation of:
 - Retirement Account
 - Life Insurance
 - Investment Account
 - Annuity
 - Other: _____

Estimated \$ value of gift: _____

- Designation of gift: Kern Community Foundation Unrestricted
- Fund Name: _____
- New Fund: _____

We welcome you as a member of our Legacy Society, which recognizes donors who have made a planned gift to an endowment. Please indicate below how you would like your name to appear in our recognition materials or if you wish to remain anonymous.

- I/We grant you permission to publish my/our name(s) as follows:

- (Please print your name as you would like it to appear in our recognition materials.)*
- I/We wish to remain an anonymous member(s).

Name Name of spouse (if applicable)

Address City, State Zip

Phone 1 Phone 2 Email

Date of birth (dd/mm/yyyy) Spouse date of birth (dd/mm/yyyy)

Signature Spouse's signature

Date Date