



Statement of Future Gifts

This form will serve to notify the in Cupertino, California, that I/we have made a provision to benefit the Cupertino Historical Society.

My/our deferred gift is in the form of:

- Outright bequest payable upon my/our death(s) directly to the Cupertino Historical Society
- Provision in will of surviving spouse payable to the Cupertino Historical Society at death
- Life insurance policy payable to the Cupertino Historical Society
- Charitable remainder trust with the Cupertino Historical Society as named beneficiary
- Beneficiary designee on an IRA, pension plan, 401(k), 403(b) or revocable trust
- Other

I/we estimate the current value of this gift is \$_____.

However, the Cupertino Historical Society and I/we both understand that future fluctuations/changes in the market/economy may have an impact on this current value.

Gift designation (ie: unrestricted, unrestricted endowment, named endowment fund):

- This is a joint commitment with my spouse
- I wish for this gift to remain anonymous
- Please do not recognize me as a member of the Historical Society

To help us administer your future gift, we ask for any supporting documentation or information you are willing to share, including a copy of the gift provisions to support the Cupertino Historical Society and the contact information for your personal representative or trustee. We understand the value and type of your gift may change depending on circumstances; we appreciate notification of such changes as they occur. Any documents or information you share will be kept confidential. This statement of future gifts is not a binding commitment, and I/we retain the right to change or revoke this gift at any time.

Print Name: _____

Date of Birth: _____

Signature: _____

Date : _____

Please Print, Sign, Date, and Return this form: Cupertino Historical Society + Museum, 10185 N. Stelling Road, Cupertino, CA 95051 Federal Tax Identification Number:94-2694547
cupertinohistoricalsociety.org