The Story of California. The Story of You.
Oakland Museum of California

COMMUNICATION OF ESTATE INTENTION

Thank you for informing us that you have included the Oakland Museum of California (OMCA) in your estate plans. With this disclosure we are pleased to welcome you as a member of the Heritage Society.

Name		Birthdate
Address		
City	State	Zip
Phone	E-mail	

An estate plan is a highly personal matter. Therefore, only those who give their permission will have their names published in a listing of Heritage Society members.

☐ Realizing that my example may encourage others to include OMCA in their estate plans, I hereby give permission for my name to be recognized.

Please list my membership in the Heritage Society as: _____

☐ Please keep my disclosure confidential. I prefer to remain anonymous.

This section is entirely optional and always confidential. Although it is in no way binding, this information is of great benefit to us in planning for OMCA's future and in ensuring your wishes are fulfilled in the future.

My estate plan provides for OMCA in the following way. Please attach a copy of the relevant provision.

☐ Bequest in Will or Trust ☐ Retirement Plan/IRA ☐ Art and Artifacts
☐ Charitable Remainder Trust ☐ Life Insurance Plan ☐ _____

I estimate the current value of this commitment at $ _____.

For future reference, please provide the contact information of your executor and/or plan administrator

_____
Name Company phone and/or email

My gift is to be used

☐ Where the need is greatest
☐ I prefer to be contacted to discuss specific ways to support OMCA.

Signature	Date

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