LONG BEACH HERITAGE

LBH Circle of Preservationists

Confidential Intention Form

Information submitted through this form is not legally binding.

Personal Information

First and Last Name: _____

Spouse First and Last Name: _____

Street Address: _____

City, State, Zip/Postal Code: _____

Phone: _____

Email: _____

Date of Birth: _____(mm/dd/yyyy)

Please provide the following planned gift information and attach a copy of the documentation or appropriate language from your will or trust, if available. Please complete all that apply.

__ I/We have included a bequest for Long Beach Heritage in my/our will or living trust.

__I/We have named Long Beach Heritage as a beneficiary of an asset:

__ Retirement Plan
__ Bank, Investment, or other Financial Account
__ Life Insurance Policy
__ Other:

__ I/We have named Long Beach Heritage as a revocable beneficiary of a Charitable Remainer Trust

__ I/We have named Long Beach Heritage as a irrevocable beneficiary of a Charitable Remainer Trust

Approximate anticipated value of gift: _____

Please provide a general description of the gift provision (such as, asset to be donated if other than cash or securities, whether gift is to create an endowment, etc.)

How is gift to be used:

__ Maintenance of Bembridge House
__ Advocacy Efforts
__ Long Beach Heritages' needs at the time of the gift.

__ Yes, you may include me/us in listings of planned gift donors.

Please indicate how you would like your name(s) to appear in our LBH Circle of Preservationists listings: _____

Legal Name: Coalition to Preserve Historic Long Beach
Tax ID: 95-3769024

Please return this document to preservation@lbheritage.org or mail to Long Beach Heritage, P.O. Box 92521, Long Beach, CA 90809