

Memorandum of Charitable Intent

Thank you for considering a bequest to Shakespeare Play On in your estate plan (*doing business as Santa Cruz Shakespeare; Tax ID# 46-4635444*). We are deeply grateful for your thoughtful commitment, and we welcome you to the **Santa Cruz Shakespeare Legacy Society**. We would appreciate your sharing as many details about your gift as possible. We understand that your plans may change in the future, and this document is not binding – it is merely a notice of intent to include us in your estate plans. If your plans change, please let us know. We promise to keep the details of your pledge confidential, except as indicated below.

Name(s): _____

Address: _____

Phone: _____ Email: _____

I have made provision(s) for Santa Cruz Shakespeare in my estate plan as follows:

- | | |
|---|--|
| <input type="checkbox"/> Charitable bequest in will/living trust: | <input type="checkbox"/> Retirement plan beneficiary |
| <input type="checkbox"/> Percentage (____%) | <input type="checkbox"/> Life insurance beneficiary |
| <input type="checkbox"/> Residual (____%) | <input type="checkbox"/> Other: _____ |
| <input type="checkbox"/> Specific amount | _____ |
| <input type="checkbox"/> Contingency | |
| <input type="checkbox"/> Charitable remainder trust | |
| <input type="checkbox"/> Charitable lead trust | |

Current estimated value of the bequest: \$ _____

I have designated my bequest to go to the:

- | | |
|--|--|
| <input type="checkbox"/> Santa Cruz Shakespeare General Fund* | <input type="checkbox"/> SCS Capital/Building Fund |
| <input type="checkbox"/> Santa Cruz Shakespeare Endowment Fund | <input type="checkbox"/> SCS Education Programs |
| <input type="checkbox"/> SCS Michael Warren Dramaturgy Fund | <input type="checkbox"/> SCS Tommy Gomez Intern Fund |

** Bequests with no designation in an estate plan will go towards the SCS General Fund*

**I am pleased to be recognized as a member of the SCS LEGACY SOCIETY
and in Santa Cruz Shakespeare publications as:**

(Or, please indicate if you wish to remain anonymous.)

I have notified the following professional advisor of this gift:

Name / Profession: _____

Address: _____

Phone: _____ Email: _____

Return to: Santa Cruz Shakespeare, Development Office, ATTN: Planned Giving, 501 Upper Park Rd, Santa Cruz, CA 95065, or email to plannedgiving@santacruzshakespeare.org.