



BEQUEST INTENTION & FOUNDER'S SOCIETY ENROLLMENT FORM

Thank you for your intent to make a gift to the San José Museum of Art (SJMA) in your estate plans. With this confidential disclosure, we are pleased to welcome you as a member of the Founders' Society. Your legacy gift will help to ensure that SJMA is accessible to our community for generations to come.

Name(s) _____

Address _____

City _____ **State** _____ **Zip** _____

Phone _____

Email _____

Signature _____ **Date** _____

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

Realizing that my example may encourage others to include SJMA in their estate plans, **I hereby give permission for my name to be recognized on SJMA donor listings.**

Please list my membership in the Founders' Society as _____

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

The more information SJMA has regarding your gift, the better able the Museum is to make sure your wishes are honored and will help the Museum with long-term planning. If you are comfortable doing so, please note below the type of gift you have made. *Completing this section is not required for SJMA Founders' Society membership nor does this form have any legal force.*

My estate plan provides for SJMA in the following way:

- Charitable bequest in a will or trust
- Charitable remainder trust
- Charitable gift annuity
- IRA/Retirement plan beneficiary designation
- Life insurance policy
- Art (must be pre-approved by SJMA's executive director)
- Other _____

I/We wish to inform SJMA that the current value of my/our future gift is \$ _____. (If a percentage of the estate, please state the approximate value.) Providing this information is optional, and will be kept confidential.

For future reference, this is the contact information of my executor and/or plan administrator:

Name _____ Company _____

Phone _____ Email _____

Please return this form to:
Kathleen Backus, Senior Philanthropy Officer
San Jose Museum of Art
110 So Market Street
San Jose, CA 95113

The information provided is not offered as legal or tax advice. Please consult your attorney, tax advisor or other professional for advice in all estate planning matters.

SAMPLE BEQUEST LANGUAGE FOR YOUR WILL OR TRUST

A gift to the San José Museum of Art (SJMA) through your will or living trust will help the San Jose Museum of Art continue to reflect the diverse cultures and innovative spirit of Silicon Valley through its exhibitions, programs, scholarship, and collections. A bequest is easy to arrange in three simple parts, will not alter your current lifestyle in any way and can be easily modified to address your changing needs. Below, please find sample language to help you make a gift to benefit the Museum.

1. Name the San José Museum of Art as a beneficiary.

Provide the name San José Museum of Art and our tax identification number:

"I give to the San José Museum of Art (TAX ID# 23-7062028), located in San Jose, CA..."

2. Identify what you wish to give to benefit the Museum.

SJMA can accept cash, stocks, retirement funds, bank accounts and some forms of property and art. If you wish to leave SJMA a specific item of property or art, please work with us in advance to ensure we can accept your gift.

Select the statement that best fits your needs:

- _____ percent of my estate
- The sum of \$_____
- My_____ (list a specific asset)
- The remainder of my estate

3. Include what you would like your gift to accomplish.

Your gift will support SJMA's general operations or will be applied as directed by the Board of Trustees, unless you work with the Museum in advance to specify a specific program (exhibitions, education, endowment, or acquisitions).

Contingent and residual gift language

SJMA can be named as a contingent or residual beneficiary in your will or living trust if one or more of your specific bequests cannot be fulfilled:

If (insert name) should predecease me, I give the remainder of my estate (or a percentage or the sum of \$_____) to the San José Museum of Art (Tax ID# 23-7062028), located in San Jose, CA.

Retirement plan beneficiary language

Naming SJMA as the beneficiary of a qualified retirement plan asset such as a 401(k), 403(b), IRA, Keogh or profit-sharing pension plan allows 100% of your hard-earned savings to avoid taxes and be put to its fullest use to continue the museum's mission-and is easy to do.

1. Request a change-of-beneficiary form from your plan administrator.

2. List the San José Museum of Art as a non-profit organization beneficiary using the TAX ID# 23-7062028.

Other considerations

Every individual has unique needs and goals. Ask your legal, financial and/or tax professionals to advise you on how to make a generous gift that is best for your specific situation. SJMA is not able to give you legal or tax advice.

Please contact Kathleen Backus, senior philanthropy officer if you have any questions at kbackus@sjmusart.org or give her a call at 408.521.4012.

Please let us know about your plans so we can thank you and welcome you to the Founder's Society.