



# Downie Society Planned Giving Program

One sentence in your will can make an incredible difference.

- I/We have included the Carmel Mission Foundation (CMF) as a beneficiary in our estate plan.**  
Thank you for making this incredible gift. To help CMF develop long-range planning and ensure your gift will be used as intended, please share the value and the nature of your planned gift:

<b>I have provided for CMF in the following way:</b>	<b>Estimated Value:</b>
<input type="checkbox"/> My/Our will/living trust	\$ _____ or _____ %
<input type="checkbox"/> A charitable remainder trust or gift annuities	\$ _____ or _____ %
<input type="checkbox"/> An IRA or other retirement plan	\$ _____ or _____ %
<input type="checkbox"/> Life insurance policy	\$ _____ or _____ %
<input type="checkbox"/> Other _____	\$ _____ or _____ %

- I/We wish to include CMF as a beneficiary in our estate plans. Please:**
- Contact me/us via the phone number noted below, or:
  - Send information about:
    - Making a bequest (e.g. cash, securities, real estate, other assets).
    - Making a life income gift (charitable remainder trust, charitable gift annuities, stock).
    - Making the Carmel Mission Foundation a beneficiary for retirement plan assets.
  - Please do not include my/our name(s) in materials. I/We prefer to be anonymous.

**Name(s) as wish to be listed (please print):**

\_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

**Please return this form to:**

**Stephanie Zelei | [SZ@CarmelMissionFoundation.org](mailto:SZ@CarmelMissionFoundation.org)  
Carmel Mission Foundation | P.O. Box 221351 | Carmel, CA 93923**