



**1849 LEGACY SOCIETY
Confidential Notification**



I/We have provided for the future strength of the Monterey Public Library through a provision in my/our estate plans in the following way:

- Provision in a will or trust.
- Retirement plan beneficiary designation.
- Insurance beneficiary designation.
- Charitable remainder trust.
- Other _____

This provision is for:

- The Monterey Public Library Friends & Foundation.
- The Monterey Public Library Endowment Fund, held at the Community Foundation for Monterey County.

I/We would be pleased to be part of the 1849 Legacy Society.

I/We would like my/our name(s) to be listed as follows:

I/We would like to be listed as Anonymous for all public recognition purposes.

I/we would appreciate more information about: _____

NOTE: We do not need to know any details about the particular provisions you have made, although knowing more is helpful to us for planning purposes. We do request, however, that you contact us if your future gift involves distributions of assets other than cash or securities (such as real estate, art, or library collections). This would allow us to know if we will be ready to accept your gift.

Name/s (please print): _____

Address: _____

Phone: _____

Email: _____

Please mail or email this Survey to:
Monterey Public Library • Fund Development Office • 625 Pacific Street • Monterey, California 93940
Inga Waite, Library Director (831) 646-5602 • waite@Monterey.org
Mary Jane Perna, Interim Fund Development Officer (831) 646-5632 • perna@Monterey.org