



ESTATE GIFT - STATEMENT OF INTENT

As evidence of my/our desire to provide a legacy in support of Olive Crest, I/we hereby inform the organization that I/we have made a provision in my/our estate plan for a gift to Olive Crest. I/we understand that this commitment is revocable and can be modified at any time.

Name: _____ Date of Birth: _____

Second name (if joint gift): _____ Date of Birth: _____

Address: _____

City: _____ State: _____ Zip: _____

Home Phone: () _____ Cell/Work Phone: () _____

Email: _____

I/We have provided (or will provide) Olive Crest in the following manner (Check all that apply):

- ☐ Will or Living Trust ☐ Retirement Assets ☐ Life Insurance Policy
☐ Charitable Trust ☐ Other _____

Name of Executor/Successor Trustee/Attorney: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: () _____ Email: _____

Please Indicate: The current estimated value of my/our estate gift is \$ _____

(Note: if gift is a percentage of your estate, please indicate the estimated value of that percentage).

PURPOSE: We would like our gift to be used:

- ☐ Where the need is the greatest.
☐ As a gift to benefit the following program(s): _____

☐ **I/We accept membership in Olive Crest's Legacy Society** and agree to have my/our name(s) published in donor publications as a motivation for others to leave a future gift benefiting Olive Crest.

☐ I/We would like to remain anonymous and prefer that my/our name(s) not be published.

By signing this document, I/we understand and agree that, should it ever become impossible or impractical to use the gift for the purpose specified in this agreement, the Olive Crest Board of Directors, in their discretion, may distribute or use the net income or may devote the entire income and principal of the Fund to the support of any other uses most similar to my original interest and intents.

I/We understand that by stating an amount above, my/our estate is not legally bound by this statement. At any time, I/we may choose to modify this gift at my/our sole discretion.

Signature: _____ Date: _____

Signature: _____ Date: _____



Please return completed form to: Olive Crest | Stephen Christensen

2130 East Fourth Street, Santa Ana, CA 92705

714.543.5437 | Stephen-Christensen@olivecrest.org

<https://www.olivecrest.org/estate-giving>

Olive Crest (Tax ID#95-2877102) is a tax-exempt organization under Section 501(c)3 of the Internal Revenue Code, classified as a public charity and eligible for charitable tax deductions. All gifts made to Olive Crest are tax-deductible, subject to the limits imposed by the Internal Revenue Code. Please consult your tax advisor.