



Charitable Bequest Information

Thank you for your intention to include MOMENTUM in your estate plan. In order to accurately document your intention, we humbly ask you to complete this form with as much detail as you are willing to share. Any information about your gift will remain confidential and does not create a binding obligation.

Recognition for Your Gift

For recognition purposes, please list my/our name(s) as follows:

Please do not include my / our name in any public listing of donors. I / We wish for my / our gift intention to be confidential and anonymous publicly.

___ MOMENTUM is included in my (our) will / estate plan

___ SCEF is included in my (our) will / estate plan

Legal Designation

Momentum, a nonprofit corporation, organized and existing under the laws of California with principal business address of:

2400 Willow Lane

Thousand Oaks, CA 91361

Momentum Agencies tax identification number is: 95-1648203

Or

Spastic Children's Endowment Foundation (SCEF), a nonprofit corporation, organized and existing under the laws of California with

principal business address of:

2400 Willow Lane

Thousand Oaks, CA 91361

SCEF tax identification number is: 23-7261108

Briefly describe allocation, designation, and how your gift should be used.

Description and Value of Gift – Please indicate below, how your future gift intention will be fulfilled and provide the estimated value.

| <u>Description</u> | <u>Amount or Percentage</u> | <u>Estimated Amount of Gift to Momentum</u> |
|---|-----------------------------|---|
| Will or Trust with a sum of | _____ | _____ |
| Charitable Gift Annuity in the amount of | _____ | _____ |
| Charitable Remainder Trust in the amount of | _____ | _____ |
| Remainder of IRA / Retirement Fund with a total current value of | _____ | _____ |
| Life Insurance Policy with a maturity value of | _____ | _____ |
| Securities with a total current value of | _____ | _____ |

Beneficiary – If MOMENTUM is only a contingent beneficiary, please explain conditions.

Documentation – Please provide us with copies of any documents (or relevant pages) that include provisions for Momentum.

Contact Information

Will or Trust – If your gift is included in a will or trust, please provide the following:

Executor(s) or Trustee(s)

Name and Address

Phone and / or Email

Beneficiary Designation – If your gift is directed by a beneficiary designation, please provide the following:

Administrator of Company

Name and Address

Phone and / or Email

Other Information, Contacts and Relationships you want us to know (family, attorney, etc.):

Name and Address

Phone and / or Email

This Declaration of Intent gives you membership into MOMENTUM's Legacy Society. You will be contacted regarding your participation.

_____ New Intention – This is a new bequest intention to MOMENTUM or SCEF

_____ Update to Intention – This is an update to a previously recorded bequest intention to MOMENTUM or SCEF

Signature

Date

Signature

Date

Print Name

Print Name

Street Address

Street Address

City, State, Zip

City, State, Zip

Email and Phone Number

Email and Phone Number

Please return the completed form (together with copies of any relevant documents) to the MOMENTUM Development Office at the address below. Please contact us if you have any questions or concerns.

Amy Simons
Chief Operating Officer
asimons@Momentum4all.org
cell: 818-515-1264
office: 818. 782.2211

Gaby Garcia
Director of Development
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