



## ESTATE INTENTION FORM

This is a confidential record regarding your intent to make a bequest through your Will or Trust. Please provide the following information so that we may include you as a member of our **Legacy Circle**, and properly thank you and acknowledge your gift. Please feel free to provide whatever information you are comfortable sharing with us. You can send your completed form by mail or fax (see contact information below). Thank you!

- Yes, I have already included Cal Shakes in my estate plans.
- My Will/Trust was signed on the following DATE: \_\_\_\_\_
- I intend to include Cal Shakes in my estate plans.
- Please contact me about including Cal Shakes in my/our estate plans. My contact information is below.
- I understand that listing me as a **Legacy Circle** member may be an incentive for others to give and I am willing to be publicly acknowledged. Please list my name this way for recognition purposes:
- \_\_\_\_\_
- I would like to participate in **Legacy Circle** activities but prefer to remain anonymous for recognition purposes.

I understand that I am not making a legal, or binding, commitment upon my estate by submitting this Estate Intention Form. Further, Cal Shakes should understand that the size of my future gift might be significantly different from the amount estimated above. If for any reason in the future California Shakespeare Theater is no longer included in my estate plan, I will notify you so that you can update your records and remove me from the **Legacy Circle** membership list.

**Donor name:** \_\_\_\_\_

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

**Date:** \_\_\_\_\_

**Send by fax to:**  
510.843.9921  
Attn: Legacy Circle

**Send by mail to:**  
California Shakespeare Theater  
Attn: Legacy Circle  
701 Heinz Avenue  
Berkeley, CA 94702

For information on how to become a member of the **Legacy Circle** or for additional information about making a legacy gift or bequest to Cal Shakes, please contact Megan Barton at 510.899.4922 or [mbarton@calshakes.org](mailto:mbarton@calshakes.org).

**Tax ID: 51-0169452**

California Shakespeare Theater (Cal Shakes) is a 501(c)(3) organization.

**Click here** to view or download our 501(c)(3) letter from the IRS.

**Click here** to return to the Legacy Giving home page.