

## The Olympic Club Foundation Legacy Circle



The Olympic Club Foundation *Legacy Circle* was formed to recognize and thank those who have included the Foundation in their estate plans through a bequest, life income plan, or other type of planned gift.

The Foundation is very grateful for your support, which ensures that we will be able to continue to provide support for sports programs for young athletes, many of whom are disadvantaged.

When you step forward, others are encouraged to do the same.

When you make a planned gift, please complete the attached form and send it to:  
**The Olympic Club Foundation, 524 Post Street, San Francisco, CA 94102.**  
When you notify us of your gift, we will enroll you in our Legacy Circle. As a member, you will receive a special Legacy Circle lapel pin. You will also be invited, together with other members, to our annual special recognition event for planned giving donors. In addition, unless you prefer to remain anonymous, you will be recognized in publications such as the Olympian magazine, the Foundation's newsletter, our display cases downtown and at Lakeside, and on our website [www.OlympicClubFoundation.org](http://www.OlympicClubFoundation.org)

Although not a requirement, should you name the Foundation in a planned gift, we would welcome a copy of the legal document that accompanies your gift. This can make estate administration easier when your gift is received and ensure that it will be put to the intended purpose(s). However, this is entirely your option.

Should you require assistance in determining the best planned giving technique for your individual circumstances, the Foundation can refer you to one of our experts for a free consultation. Of course, your professional advisors are welcome to be involved in these discussions.

Thank you for considering including the Olympic Club Foundation in your estate plan. If you have any questions, please contact Executive Director, John Ring at 415-710-0580, and he will put you in touch with the person with the appropriate expertise to respond to your questions.

**Olympic Club Foundation  
Legacy Circle Notification Form<sup>1</sup>**

I, \_\_\_\_\_, wish to inform you that I have made a provision in my estate plan to benefit the Olympic Club Foundation.

I have done so in the following way(s): (check the appropriate method)

\_\_\_ charitable bequest (check one of the following):

\_\_\_ percentage \_\_\_ residual \_\_\_ specific \_\_\_ contingency

\_\_\_ retirement plan (IRA, 401k, SEP, etc.)

\_\_\_ charitable remainder trust

\_\_\_ charitable lead trust

\_\_\_ other

\_\_\_ life insurance designation (please specify):

Name of contact \_\_\_\_\_

Company \_\_\_\_\_

Phone # \_\_\_\_\_

Policy # \_\_\_\_\_

Please use the following names for recognition:

\_\_\_\_\_ or \_\_\_ wish to remain anonymous

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

Phone #: \_\_\_\_/\_\_\_\_/\_\_\_\_\_

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

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Please sign and date this form for our records.

Name: \_\_\_\_\_ Date: \_\_\_\_\_

<sup>1</sup> Please return to: The Olympic Club Foundation, 524 Post Street, San Francisco, CA 94102.

### Optional Information

Amount and/or description of gift \_\_\_\_\_

\_\_\_\_\_

Is the gift unrestricted?<sup>2</sup> Yes \_\_\_\_\_ No \_\_\_\_\_

If no, please describe below how you want your gift to be used. The Foundation will make every effort to accommodate your wishes, within our IRS-approved mission of supporting youth athletics.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Copy or excerpt of document enclosed \_\_\_ Yes \_\_\_ No

Date of birth: \_\_\_/\_\_\_/\_\_\_\_\_

\_\_\_ Do not send recognition certificate

\_\_\_ Do not send recognition gift

\_\_\_ I am pleased to provide this gift but I do not wish to join the Legacy Circle

<sup>2</sup> Unrestricted gifts can be used at the Foundation's discretion to support youth athletic programs or the Foundation's Olympic Games competition fund.