



Legacy Society of Ombudsman Services of San Mateo County

The Legacy Society of Ombudsman Services of San Mateo County (OSSMC) recognizes individuals and couples who have notified OSSMC that they have named OSSMC as the beneficiary of any type of planned or deferred gift.

Joining the Legacy Society can be accomplished in two easy steps:

1. Include a charitable bequest designating the OSSMC as a beneficiary in your estate plan. Such bequests are generally accomplished by including the OSSMC as a beneficiary of:

- A will or trust
- An IRA or 401K retirement plan
- A life insurance policy
- A charitable gift annuity, charitable remainder trust or other planned gift

2. Inform OSSMC that you have made the necessary arrangements by returning the form that is printed below. Returning the completed form will allow us to acknowledge your planned gift.

Legacy Society Designation Form

I/We have made a provision to include the OSSMC as a beneficiary of my/our estate plans, and wish to be included in the Legacy Society.

OSSMC is authorized to list the following name(s) as members of the Legacy Society:

(Please print your name(s) as you would like them to be listed)

I/We have made a provision to include OSSMC as a beneficiary of my/our estate plans, but prefer not to be listed as members of the Legacy Society.

I/We have made a provision to include OSSMC as a beneficiary of my/our estate plans, but prefer not to be listed as members of the Legacy Society. OSSMC is authorized, however, to recognize the gift under the title of "Anonymous."

I/We have not yet made provisions to include the OSSMC as a beneficiary of my/our estate plans, but would like additional information about how I/we might utilize OSSMC as we consider leaving a legacy gift.

Signature	Date	Printed Name
Street Address or P.O. Box	City, State, Zip Code	
Email Address	Phone	

Please return the completed form by mail, fax or email to:
 Ombudsman Services of San Mateo County
 711 Nevada Street, Redwood City, CA 94061
 Fax: 650-364-5399
 mitchreitman@ossmc.org