

# Memorandum of Charitable Intent (MOCI) Worksheet

Rev-05-01-2019

This worksheet is designed to help you prepare your instructions regarding the use of charitable assets directed by you to the Community Foundation. It is only a starting point; there are no wrong answers! We will follow up with you to answer questions, explain options, and discuss your wishes.

Your Name(s): \_\_\_\_\_

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

Your Email/Phone: \_\_\_\_\_

Optional: Your estate planning attorney's name: \_\_\_\_\_

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**Issues You Care About:** Are there issues or areas of interest that you would like to support with your gift to the Foundation? (e.g. Access to Health Services, Preserving the Environment, Supporting the Arts....).

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**Did You Know?** The Foundation has a number of endowed funds designed to collect gifts from donors who share a common interest. Some of these funds were seeded by the Foundation, others by individual donors. The Foundation determines which nonprofits will receive support from these funds. Please indicate if you would like to know more about any the endowed funds which focus on the following areas of interest:

|                          |                         |
|--------------------------|-------------------------|
| <input type="checkbox"/> | Animal Welfare          |
| <input type="checkbox"/> | Arts and Culture        |
| <input type="checkbox"/> | Childcare               |
| <input type="checkbox"/> | Children and Youth      |
| <input type="checkbox"/> | Community Development   |
| <input type="checkbox"/> | Educational Advancement |
| <input type="checkbox"/> | Environment             |
| <input type="checkbox"/> | Health                  |

|                          |                          |
|--------------------------|--------------------------|
| <input type="checkbox"/> | Historic Preservation    |
| <input type="checkbox"/> | Human Services           |
| <input type="checkbox"/> | LGBTQ Community Services |
| <input type="checkbox"/> | Pajaro Valley            |
| <input type="checkbox"/> | San Lorenzo Valley       |
| <input type="checkbox"/> | Seniors                  |
| <input type="checkbox"/> | Women and Girls          |

**Organizations You Care About:** Are there specific nonprofit organizations that you would like to support with your gift to the Foundation? These nonprofits can be located outside Santa Cruz County, if desired.

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**Did You Know?** The Foundation holds endowed funds that benefit more than 50 local organizations. Each fund was started either by the organization itself or by a donor for that organization’s benefit. These organizations receive annual distributions from the Foundation, per our spending policy. Your MOCI can instruct us to add to one of these Funds or to create a new fund for an another nonprofit.

Actors' Theater  
 Agri-Culture  
 Agricultural History Project  
 American Cancer Society Santa Cruz County  
 American Red Cross Santa Cruz County  
 Big Brothers Big Sisters Santa Cruz County  
 Bonny Doon Education Foundation  
 Boys and Girls Club of Santa Cruz  
 Cabrillo College CAP Program  
 Congregational Church of Soquel  
 CASA - Court Appointed Special Advocates  
 Elkhorn Slough Foundation  
 Family Services of the Central Coast  
 Friends of Santa Cruz State Parks  
 Friends of the Santa Cruz Public Libraries  
 Girls Scouts of California’s Central Coast  
 Habitat for Humanity Monterey Bay  
 Happy Valley School  
 Hospice of Santa Cruz County  
 Kuumbwa Jazz Society  
 Land Trust of Santa Cruz County  
 Main Beach Volleyball Club  
 Meals on Wheels  
 Moreland Notre Dame School  
 Mountain Community Resources  
 Museum of Art & History at the  
 McPherson Center

New Music Works  
 O'Neill Sea Odyssey  
 Pajaro Valley Historical Association  
 Pajaro Valley Quilt Association  
 Pajaro Valley Shelter Services  
 Quail Hollow Ranch County Park  
 Salvation Army, Santa Cruz  
 Salvation Army, Watsonville  
 Santa Cruz County Animal Shelter  
 Santa Cruz County Symphony  
 Santa Cruz Sailing Foundation  
 Santa Cruz Shakespeare  
 Santa Cruz SPCA  
 Save Our Shores  
 Second Harvest Food Bank  
 Temple Beth El  
 Twin Lakes Church  
 UCSC Arboretum  
 Ventana Wilderness Alliance  
 Visiting Nurse Association of Santa Cruz  
 County  
 Volunteer Centers of Santa Cruz County  
 Watsonville High School Foundation  
 Watsonville Public Libraries  
 Watsonville Wetlands Watch  
 YWCA of Watsonville

**What Happens Next?**

Please send this form to Robin Larsen by to email [rlarsen@cfsc.org](mailto:rlarsen@cfsc.org). She will contact you to set up a meeting to gather more information. You may also mail the form to 7807 Soquel Dr., Aptos CA 95003

**Please note:** There is no charge for creating or updating a MOCI. There is a one-time 2% Bequest Fee at the time the assets are received by the Foundation.

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