

Memorandum of Charitable Intent (MOCI) Worksheet

Rev-03-04-2021

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: _____

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....).

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.

Did You Know? The Foundation holds endowed funds that specifically benefit nearly 60 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 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
 For Kids Foundation Monterey Bay
 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
 Jacob’s Heart Children’s Cancer Support
 Kuumbwa Jazz Society
 Land Trust of Santa Cruz County
 Loma Prieta School
 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 Loaves and Fishes
 Pajaro Valley Quilt Association
 Pajaro Valley Shelter Services
 Quail Hollow Ranch County Park
 Salvation Army, Santa Cruz
 Salvation Army, Watsonville
 San Lorenzo Valley Museum
 Santa Cruz County Animal Shelter
 Santa Cruz County Fairgrounds Foundation
 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 Hilary Bryant by email at hbryant@cfsc.org. She will contact you to set up a meeting to gather more information. You may also mail the form to Hilary at 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.**