

# Calvary Chapel Monterey Bay Foundation, Inc.

## Vision of Foundation

*CCMB Foundation is a tax-exempt organization responsible to invest and disburse the interest from estate gifts from our members and other interested parties.*

We want to:

- Encourage/train every member to create a will, including those who would become our children's legal guardians at our passing.
- Encourage/train every member to create a complete estate plan including Advanced Health Care Directive and plans for their own memorial service.
- Encourage every member to remember CCMB in their estate plans to fund long-range charitable projects.

This Foundation is a separate 501(c)(3) corporation from CCMB so it can focus especially on this task of creating an endowment fund for future CCMB projects. As our By-Laws specifically read, we exist "to facilitate planned giving from the friends and members of Calvary Chapel Of Monterey Bay to fund long-range projects in Christian missions, community outreach, Christian education, construction and purchase of new facilities...."

## Board of Foundation

President/CEO of	Geoffrey Buck	Assistant Pastor, Calvary Chapel Monterey Bay
Secretary	Barbara Mejia	Attorney, Estate Planning, Trust & Probate Law Specialist
CFO	Steve Wotherspoon	Sr. Vice-President, Pinnacle Bank, Salinas
Member	Bob Treat	Retired Engineer
Member	Red Bryan	Local Agribusiness Owner

As a board, we can encourage you toward the goals stated above. There will be no pressure for anyone to specifically include CCMB in their will, though we certainly welcome it, provided that one's own family is first provided for. We will provide referrals upon request for financial/legal services to avoid conflict of interest issues. Pastor Geoff (and the other board members) will meet freely with anyone on pastoral or personal

decisions that they must make on matters like end of life issues, guardianship of children, and advance planning for memorial services.

### Action Steps!!!!

**Please check any that apply and return to Pastor Geoff Buck by mail, email, fax, or in person. Please call him with any questions at all. He will connect you with the board member(s) that will be most helpful to you.**

\_\_\_\_\_ I would like to create an estate plan that would protect my assets, protect my beneficiaries, and delineate guardianship for my minor children at my death

\_\_\_\_\_ I would like help organizing my personal papers (life insurance, banking information, credit cards, mortgages, home insurance, retirement accounts, powers of attorney, wills, and trusts) so that my family will know exactly what to do at my death or if I am unable to take care of my own affairs.

\_\_\_\_\_ I would like to discuss end of life issues such as creating an Advanced Health Care Directive, establishing a Power of Attorney, and planning a memorial service

\_\_\_\_\_ I would like to know more about options for including Calvary Chapel Monterey Bay Foundation in my estate plan, and what language to use in making those gifts.

Pastor Geoff Buck can be reached at Calvary Monterey, 3001 Monterey-Salinas Hwy., Monterey, CA. 93940. Phone is (831)649-1158 and fax is (831-649-4752. His email is [geoff@calvary.com](mailto:geoff@calvary.com).

#### Your Contact Information

Name \_\_\_\_\_

Address \_\_\_\_\_

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Telephone \_\_\_\_\_

Email \_\_\_\_\_