

Letter of Intent for a Future (Estate) Gift

As evidence of my/our desire to provide a legacy of support to the University of Minnesota, I/we hereby inform the University of Minnesota Foundation that I/we have made a provision for a gift to the University in my/our estate plan. I/we understand that this commitment is revocable and can be modified by me/us at any time.

_____ Name	_____ Date of Birth	_____ Second Name (if joint gift)	_____ Date of Birth
_____ Address	_____ City	_____ State	_____ Zip
(_____)_____ Phone	(_____)_____ Fax	_____ E-mail	

It is my/our intent to leave a legacy to the University of Minnesota through my/our:

- Will Retirement Plan Assets Life Insurance Policy
 Living Trust Charitable Remainder Trust* Other _____

I/we wish to inform the University of Minnesota Foundation, for long-term planning purposes only, that as of this date, the value of my/our gift is: \$_____.** *(If your gift is a percentage of your estate, please indicate the approximate present value of that percentage.)* I/we understand that, by stating an amount, my/our estate is not legally bound by this statement and I may choose to add, subtract, or revoke this bequest at any time, at my/our sole discretion. *(The University of Minnesota Foundation requests notification any time you make changes or adjustments to your gift.)*

Please designate this gift to benefit the following campus, college, program, or to “where the need is greatest”:

Please enroll me/us in the University of Minnesota **HERITAGE SOCIETY** under the following conditions:

- Feel free to publish my/our name(s) among your lists of Heritage Society members as a motivation for others to leave a future gift to benefit the University of Minnesota. I/we wish my/our names(s) to appear as:

- Do not publish my/our names on any donor roster (this is an anonymous gift).

Date Donor(s) Signature(s)

* If your CRT beneficiary designation is irrevocable, please enclose a copy of the trust document for enrollment in an additional recognition society.

** We hope that you will share the approximate amount of your gift with us so that the benefiting college or program will know of your generosity and be able to recognize you appropriately. It is also helpful for us to have on file any supporting documentation which you may be able to share with us. Please attach if possible.

