

STATEMENT OF INTENT for a Future (Estate) Gift

As evidence of my/our desire to provide a legacy of support to Iowa State University, I/we hereby inform the Iowa State University Foundation that I/we have made 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 _____ Birthdate _____

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DESCRIPTION OF GIFT (TYPE/VALUE)

- Bequest through will/ trust:
 - percentage of estate _____ specific amount \$ _____
 - other (please specify) _____
- Charitable Trust (select one) unitrust annuity trust revocable trust lead trust
- Charitable Gift Annuity (select one) immediate deferred
- IRA or Retirement Plan (please describe) _____
- Other (please describe) _____

I/We have provided will provide to the ISU Foundation a copy of the portion of my/our will(s) or other instrument that pertains to Iowa State University.

With the understanding that values are subject to change, at the time I/we estimate the value of my/our gift to be approximately \$ _____ in today's dollars.* I/we understand that, by stating an amount, my/our estate is not legally bound by this statement and I/we may choose to add, subtract, or revoke this bequest at any time, at my/ our sole discretion.

PURPOSE OF FUTURE GIFT

- This gift is to be unrestricted and may be used where the need is greatest at Iowa State University.
- I/We wish to specify that this gift be used for the following purpose(s):

- It is my/our intent that this gift commitment remain confidential. My/Our signed confidentiality request form is attached.

DONOR SIGNATURE _____ **DATE** _____

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The Iowa State University Foundation and its employees do not provide tax or legal advice. Prospective donors should consult with their legal and financial advisors. * 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.

THANK YOU FOR YOUR SUPPORT OF IOWA STATE UNIVERSITY!

The Iowa State University Foundation respects the privacy of donors' personal and financial information and will not release information to the public about prospective or actual donors other than donors' names, gift amounts and gift designations. Requests from donors that their names not be released will be honored. If you have questions please call 1-866-419-6768 or e-mail questions@foundation.iastate.edu.

NOTICE: The Iowa State University Foundation solicits tax deductible private contributions for the benefit of Iowa State University and is registered to solicit charitable contributions in all states requiring registration. For our full disclosure statement, see www.foundation.iastate.edu/disclosure.