



# Planned Giving

## ESTATE INTENTION LETTER

STATEMENT OF ACCEPTANCE (Please print name in space below.)

\_\_\_\_\_ have established a deferred gift for the ultimate benefit of the LSU Foundation. By completing this form, I/we accept membership in the 1860 Society.

### TYPE OF GIFT

- Bequest (Will)
- Charitable Remainder Unitrust
- Charitable Remainder Annuity Trust
- Revocable Trust
- Retirement Account Designation
- Life Insurance
- Life Insurance Beneficiary Designation
- Deferred Gift Annuity
- Charitable Gift Annuity
- Other (please describe): \_\_\_\_\_

ESTIMATED VALUE OF GIFT \_\_\_\_\_ or PERCENT OF ESTATE DEDICATED TO LSU FOUNDATION \_\_\_\_\_

### GIFT PURPOSE

- My/our gift is unrestricted to allow the LSU Foundation flexibility to direct funds where LSU needs them most.
- My/our gift is designated for the following purpose(s): \_\_\_\_\_

If the information provided herein should change, I/we agree to inform the LSU Foundation's planned giving team of the change.

\_\_\_\_\_ (Please initial.)

### DONOR LISTING

I/we agree that the following may be included in all 1860 Society and LSU Foundation publications:

- Name(s)       Amount of Gift
- My/our name(s) should be listed as follows: \_\_\_\_\_
- I/we wish to opt out of all public recognition for our gift commitment.

SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_

SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_

ADDRESS \_\_\_\_\_

BIRTHDATE(S) optional \_\_\_\_\_

ATTORNEY OR FINANCIAL PLANNER optional \_\_\_\_\_

