

PLANNED GIVING STATEMENT OF INTENT

PERSONAL INFORMATION (please print)

Name _____ Name _____
 Home address _____ City _____ State _____ ZIP _____
 Email _____ Phone _____

TERMS

1. I/we are happy to declare that The University of Akron Foundation will receive a future gift through one or more of the following methods:

Type of Gift	Value/Percentage to the UA Foundation
<input type="checkbox"/> Will/Trust	\$ _____ %
<input type="checkbox"/> Stock Portfolio	\$ _____ %
<input type="checkbox"/> Retirement Plan Assets—IRA, 401(k), 409(b)	\$ _____ %
<input type="checkbox"/> Chairitable Remainder Trust	\$ _____ %
<input type="checkbox"/> Other _____	\$ _____ %

2. Attached is a copy of the applicable excerpt of my/our will, trust, beneficiary designation form or other planning document that allows the UA Foundation to review the language and confirm my/our wishes to be carried out as intended.

3. I/we direct this future gift to be used for the following purpose(s): _____

4. The University of Akron Foundation acknowledges that this gift is fully revocable and the specifics of my gift will be treated as confidential.

I/we allow the University to include my/our name with other donors in the University's 1870 Giving Society, campaigns, and similar language.

Please send a copy to my estate planning attorney and/or financial advisor:

I/we prefer to be anonymous.

SIGNATURES

_____ Date

_____ Date

For The University of Akron Foundation:

Kimberly M. Cole
Executive Director

_____ Date

Thank you for your commitment to higher education!

As with any decision involving your estate plans, we urge you to seek the advice of professional counsel when considering a planned gift to The University of Akron Foundation.

Center for Gift and Estate Planning ■ Department of Development, Akron, OH 44325-2603 ■ 330-972-7173