



The University of Akron
Foundation

BEQUEST/BENEFICIARY 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 my/our will, trust, or beneficiary transfer (commercial asset accounts: life insurance, annuities, retirement IRA, 401K, brokerage, bank, etc.):

Dollar amount of \$ _____

OR

Percentage _____% representing an estimated gift of \$ _____

2. Attached is a copy of the applicable excerpt of my/our will, trust, beneficiary agreement or another planning document that allows the Foundation to review the language and confirm my/our wishes can be carried out as intended.
3. I/we direct that this future gift be used for the following purpose(s):

4. The University of Akron Foundation acknowledges that my bequest/beneficiary gift remains fully revocable and the specifics of my gift will be treated as confidential. However, I/we allow the University to include my/our name with other donors named in the University's 1870 Giving Society, campaigns, and similar listings.

SIGNATURES

Date _____

Date _____

For The University of Akron Foundation:

Date _____

Kimberly M. Cole
Executive Director

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 444325-2603 / Phone 330-972-2819