

Southwest Minnesota State University Foundation

Letter of Intent for a Future Gift

(Please complete both sides of this form.)

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

Name(s)

Address

City

State

Zip

Phone

Fax

E-mail

It is my intent to leave a legacy to Southwest Minnesota State University through my:

- | | | |
|--|---|--|
| <input type="checkbox"/> Will | <input type="checkbox"/> Retirement Plan Assets | <input type="checkbox"/> Life Insurance Policy |
| <input type="checkbox"/> Living Trust | <input type="checkbox"/> Charitable Remainder Trust | <input type="checkbox"/> Charitable Gift Annuity |
| <input type="checkbox"/> Charitable Lead Trust | <input type="checkbox"/> Gift of Real Estate | <input type="checkbox"/> Other _____ |

I wish to inform Southwest Minnesota State University Foundation, for long-term planning purposes only, that as of this date, the value of my gift is: \$ _____.* I understand that by stating an amount, my estate is not legally bound by this statement and I may choose to add, subtract, or revoke this intention at any time, at my sole discretion.

** We hope that you will share the approximate amount of your gift with us so that the benefiting 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 that you may be able to share with us. Such documentation might include a copy of the relevant pages of your Will or beneficiary designation form. Please attach if possible. Additionally, Southwest Minnesota State University Foundation requests notification any time you make changes or adjustments to your gift.*

It is my desire that this gift be used in the following manner:

- Where the need is greatest; or
- To benefit the following program: _____
- (Please complete the reverse side.)*

CONFIDENTIAL

The Southwest Minnesota State University Foundation Heritage Society was established to recognize those individuals who have thoughtfully and generously included a gift to support Southwest Minnesota State University in their estate plans.

Please enroll me in the Southwest Minnesota State University Foundation Heritage Society under the following conditions:

- △ Feel free to publish my name among your lists of Southwest Minnesota State University Foundation Heritage Society members as a motivation for others to leave a future gift to benefit Southwest Minnesota State University. My name should be listed as _____
- △ Please list my name internally to the University only (no outside publication).
- △ I would like this to be an anonymous gift. Please do not list my name either internally or externally.

Date _____

Donor Signature _____

Date _____

Donor Signature _____

Please return this completed form to:

**Southwest Minnesota State University
Foundation
1501 State Street
Marshall, MN 56258
Telephone: (507) 537-6266
Toll-free: (800) 260-0970
Fax: (507) 537-6577
E-mail: bill.mulso@smsu.edu**