



LETTER OF INTENT FOR A FUTURE GIFT

It is my/our desire to inform the Southwest Minnesota State University Foundation that a provision in my/our estate and/or financial plans has been made for the future benefit of Southwest Minnesota State University. This is not considered to be a legal obligation and all information will be treated confidentially.

Name: _____ Date of Birth: _____

Spouse Name (if applicable): _____ Date of Birth: _____

TYPE OF GIFT

I/We have provided a gift to Southwest Minnesota State University through the SMSU Foundation as a bequest in:

- Will/Living Trust Life Insurance* Retirement Plan* Financial Account* Charitable Trust

*Name of Company/Financial Institution/IRA Custodian: _____

Other _____

GIFT OPTIONS

Please select your gift option for Southwest Minnesota State University:

- Percentage of Estate Specific Dollar Amount Specific Asset(s) or Property

As of today's date, I/We estimate the current value of this gift to be \$ _____

PURPOSE OF GIFT

- This is an unrestricted gift
 This gift is to be used for the following purpose(s): _____

HERITAGE SOCIETY INFORMATION

Please recognize my/our Heritage Society status:

- Effective this year
 In Memoriam
 Anonymous

The value of deferred gifts as well as the provisions themselves may change over time. Your signature verifies only that the above information is accurate as of this date and does not represent a legal or binding commitment to the University or the Foundation.

Signature: _____ Date: _____ Signature: _____ Date: _____

Thank you for your generous and vital support of Southwest Minnesota State University

Development Officer Signature: _____ Date: _____

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