

St. Thomas University 1946 Heritage Society Enrollment & Intention Form



The St. Thomas University 1946 Heritage Society is reserved for a group of committed, generous group of donors that choose to include the University within their estate plans. Members of the 1946 Heritage Society have elevated the University to the status of family, and through their generosity are preserving the legacy of our mission to prepare ethical leaders for a global community.

This form is merely an intention made to assist St. Thomas University in projecting future financial support and gift expectancies, and to fulfill donor intent. **Signing this form does not create a binding legal obligation upon the donor(s) or the estate of the donor(s), and the intentions expressed herein may be revoked, changed, or amended at any time and for any reason, in the sole discretion of the donor(s).**

As an indication of my/our philanthropic support, I am/we are pleased to inform St. Thomas University that I/we intend to make a planned gift or have made a provision for a gift in my/our estate plans as indicated below:

- | | |
|--|---|
| <input type="checkbox"/> Will or Trust bequest | <input type="checkbox"/> Charitable Gift Annuity |
| <input type="checkbox"/> Bequest in the Will of the surviving spouse | <input type="checkbox"/> Charitable Remainder Trust |
| <input type="checkbox"/> Life Insurance Policy | <input type="checkbox"/> Charitable Lead Trust |
| <input type="checkbox"/> IRA Charitable Rollover | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> IRA or other beneficiary designation
(e.g. retirement account, bank account, etc.) | _____ |

General description of gift provision (e.g. percentage, value, type)

The current value of my/our gift is estimated to be approximately \$ _____

The gift is to be used for:

- The University's area of greatest opportunities (Unrestricted)
 - A Restricted Purpose (please specify academic unit and purpose, if applicable, e.g. scholarships, research, program support, faculty/staff support, etc.)
- _____
- _____

- A copy of the pertinent provision of the relevant document is attached or will be sent when it is executed.

Acknowledgment of Gift: *Please mark one.*

- Please keep this gift completely anonymous.
- I/we authorize publicity of this gift for acknowledgment for internal or external recognition.

My/our names should appear as _____

I/we understand that I/we will be enrolled into the St. Thomas University 1946 Heritage Society and will be honored accordingly, unless otherwise indicated above.

Signature of Donor(s): _____ Date: _____

Birth date(s): _____

The University is very grateful for your support.