



LETTER OF INTENT FOR A FUTURE (ESTATE) GIFT

As evidence of my/our desire to provide a legacy of support to PLU, I/we hereby inform the Harstad Heritage Society that I/we have made a provision for a gift to the University in my/our estate plan. I/We understand that this commitment is revocable and I/we can modify it at any time.

Name: _____ Class Year: _____

Name: _____ Class Year: _____

Address: _____

City: _____ State: _____ Zip: _____

Home Phone: _____ Cell Phone: _____ Work Phone: _____

Email: _____

Financial/Legal Advisor Name (optional): _____

Financial/Legal Advisor Address: _____

City: _____ State: _____ Zip: _____

Work Phone: _____ Cell Phone: _____ Email: _____

It is my/our intent to leave a legacy to PLU by making PLU the full or partial beneficiary of my/our:

- Will Retirement Plan
- Charitable Gift Annuity Living Trust
- Charitable Remainder Trust Life Insurance Policy Other: _____

I/We wish to inform the Harstad Heritage Society, for long-term planning purposes only, that as of this date, the value of my/our gift is \$ _____ (If your gift is a percentage of your estate, please indicate the approximate present value of that percentage).

I/We understand that, by stating an amount, my/our estate is not legally bound by this statement and I/we may choose to add, subtract, or revoke this bequest at any time, at my/our sole discretion (The Harstad Heritage Society requests notification any time you make changes or adjustments to your gift).

Please use this gift for the following purpose:

- Unrestricted annual support Unrestricted endowment support
- Special capital project or area of interest: _____
- I/We wish to contribute to the already established _____ endowed fund
- I/We wish to establish an endowed fund or an endowed scholarship
(A representative from PLU Advancement will contact you to document your intentions)

This gift is:

In honor of: _____

In memory of: _____

Please enroll me/us in the Harstad Heritage Society under the following conditions:

- I/We give PLU permission to publish my/our name(s) as Harstad Heritage Society members as motivation for others to leave a future gift to Pacific Lutheran University (value of gift is always confidential)
- Please do not publish my name as a Harstad Heritage Society member (keep my gift anonymous)

Signature(s): _____ Date: _____