



**STATEMENT OF INTENT FOR AN ESTATE OR DEFERRED COMMITMENT**

As evidence of my/our desire to provide a legacy of support to Illinois State University, I/we hereby inform the Illinois State University Foundation that I/we have made provisions for a gift to the University in my/our estate plans. I/we understand that this commitment can be modified by me/us at any time.

Name: \_\_\_\_\_ Birthdate: \_\_\_\_\_

Name: \_\_\_\_\_ Birthdate: \_\_\_\_\_

**Gift Type**

- Bequest through a will/trust:
  - Percentage of estate \_\_\_\_\_% or  Specific amount \$ \_\_\_\_\_
  - Other (please specify): \_\_\_\_\_
- Charitable Trust (select one): \_\_\_ Unitrust \_\_\_ Annuity Trust \_\_\_ Revocable Trust \_\_\_ Lead Trust
- Charitable Gift Annuity: \_\_\_ Current \_\_\_ Deferred
- IRA or Retirement Plan: \_\_\_ Primary \_\_\_ Contingent Beneficiary
- Other (please describe): \_\_\_\_\_
- I/We have provided, or will provide, the ISU Foundation a copy of the portion of my/our will(s) or other instrument(s) that pertain to our commitment.

**Estimated Gift Value**

Understanding that the value is subject to change, as of today, I/we estimate the value of my/our deferred commitment to be approximately \$ \_\_\_\_\_. I/we understand that, by stating the amount, my/our estate is not legally bound by this statement, and I/we may choose to modify this bequest at any time, at my/our sole discretion.

**Gift Designation**

- The gift is unrestricted and may be used where the need is greatest at Illinois State University.
- Please designate the gift for this specific purpose:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Recognition**

- I/we accept recognition in the University's Heritage Society as a result of this commitment and authorize ISU and the ISU Foundation to list my/our name(s) among those of other donors in recognition communications.
- I/we do not wish to receive any recognition by ISU or the ISU Foundation.

Donor Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Donor Signature: \_\_\_\_\_ Date: \_\_\_\_\_

*Thank you for your support of Illinois State University.  
The Illinois State University Foundation does not provide tax or legal advice.  
Prospective donors should consult their legal and financial advisors.*