



Declaration of Future Intent

Louisiana.giftlegacy.com

Thank you for your intention to include University of Louisiana at Lafayette in your estate plan. In order to accurately document your intention, please complete this form with as much detail as you are willing to share. Any information about your gift will remain confidential and does not create a binding obligation.

Planned gifts in support of the University of Louisiana at Lafayette should name the university's 501(c)3 non-profit organization as the beneficiary as follows: University of Louisiana at Lafayette Foundation (tax ID #72-6023836)

Recognition of Your Gift

For recognition purposes, please list my/our name(s) as follows:

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- Please do not include my/our name in any public listings of donors
 - I/we wish for my/our gift intention to be confidential and anonymous, publicly and in University of Louisiana at Lafayette records.
 - Gift Agreement** - I/We have signed a Gift Agreement with University of Louisiana at Lafayette Foundation for this gift and have made no changes to the designation or purpose.
 - No Gift Agreement** - Briefly describe allocation, **designation**, and how your gift should be used.
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Description and Value of Gift - Please indicate below (by checking applicable options), how your future gift intention will be fulfilled and provide the estimated value for University of Louisiana at Lafayette.

Description	Amount or Percentage	Estimated Amount of Gift to University of Louisiana at Lafayette
<input type="checkbox"/> Will or Trust with a sum of	_____	_____
<input type="checkbox"/> Charitable Gift Annuity in the amount of	_____	_____
<input type="checkbox"/> Charitable Remainder Trust in the amount of	_____	_____
<input type="checkbox"/> Remainder of Retirement Fund/IRA with a total current value of	_____	_____
<input type="checkbox"/> Life Insurance Policy with a policy value at maturity of	_____	_____
<input type="checkbox"/> Other item or Asset in the amount of Please describe (Private collections, real estate, securities, etc.)	_____	_____

Beneficiary - If University of Louisiana at Lafayette is only a contingent beneficiary, please explain conditions.

*Please provide us with copies of any documents (or relevant pages) that include provisions for University of Louisiana at Lafayette.

Contact information

Will or Trust - If your gift is included in a will or trust, please provide the following:

Executors(s) or Trustee(s)

Name and Address

Phone and/or Email

Beneficiary Designation - If your gift is directed by a beneficiary designation, please provide the following:

Administrator or Company

Name and Address

Phone and/or Email

Other Information, Contacts and Relationships You Want Us To Know (family, attorney, etc.)

Name and Address

Phone and/or Email and Relationship

This Declaration of Intent may enroll you in the Louisiana Heritage Society. You will be contacted about this.

New Intention - this is a new bequest intention to University of Louisiana at Lafayette.

Update to Intention - this is an update to a previously recorded bequest intention to University of Louisiana at Lafayette.

Signature _____ Date _____

Signature _____ Date _____

Print Name _____

Print Name _____

Street Address _____

Street Address _____

City, State, Zip _____

City, State, Zip _____

Email and Phone Number _____

Email and Phone Number _____

Director of Development for Colleges

Senior Director of Planned Giving

Banner ID # _____

Executive Director of Development

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