

**LEGACY SOCIETY LETTER OF INTENT**

The Legacy Society was established to formally recognize the generous philanthropic intent of UT alumni and friends who have included a charitable gift to the University in their estate plans.

This letter of intent confirms a donor’s plans to include a charitable estate provision to support The University of Tampa.

**GIFT DESCRIPTION**

\* Note that estate gifts require the following **page copies** of the donor instrument:

 -- the **beneficiary section or codicil** designating UT as a recipient;

 -- the **donor signature page;**

 -- **contact information** for the trustee, executor or administrator of the estate (if applicable).

**\_\_\_\_Will or Revocable (Living) Trust)**

Specific amount \_\_\_\_\_\_\_\_\_\_\_

Percentage \_\_\_\_\_% with an approximate value of \_\_\_\_\_\_\_\_\_\_\_\_\_

Check applicable descriptions:

\_\_\_Outright bequest in my will \_\_\_Outright bequest in my spouse’s will

\_\_\_Bequest in my will if spouse or other heir predeceases me

\_\_\_Bequest in my spouse’s/other heir’s will if I predecease my spouse/other heir

**\_\_\_\_IRA or Retirement Plan**

Full amount with an approximate value of\_\_\_\_\_\_\_\_\_\_\_\_\_

Defined amount with an approximate value of\_\_\_\_\_\_\_\_\_\_\_\_\_

Percentage \_\_\_\_\_% with an approximate value of \_\_\_\_\_\_\_\_\_\_\_\_\_

**\_\_\_\_Insurance Policy**

Full Amount with a value of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Percentage \_\_\_\_\_% with a value of \_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_Whole life \_\_\_\_Universal Life

\_\_\_\_**Other (Please explain.)**

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

**PURPOSE**

 Unrestricted gift (use by the University where there is most need)

 Gift to the UT Endowment (named scholarships, faculty, and program support)

 Other designation \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**RECOGNITION**

Estate gift donors are recognized annually as members of the UT Legacy Society. UT may contact donors regarding use of their name/gift in promoting, publicizing or explaining fundraising activities.

Please print name(s) for gift recognition. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_ I/We wish to keep this gift private.

**CONTACT INFORMATION**

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

 Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**SIGNATURES** *This gift/pledge is a declaration of intent and is not a legally binding contract*.

Donor(s): \_\_\_\_­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 On behalf of The University of Tampa