

STATEMENT OF INTENT

for a Future (Estate) Gift



As evidence of my/our desire to provide a legacy of support to Des Moines University, I/we hereby inform Des Moines University that I/we have made provision for a gift to the University in my/our estate plan. I/we understand that this commitment is revocable and can be modified by me/us at any time.

Name: _____ Birth Date: _____

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STEP 1: DESCRIPTION OF GIFT

Type of Gift

Bequest through will/trust:

Percentage of estate: _____ Specific amount \$ _____

Other (please specify) _____

Charitable Trust (select one): Unitrust Annuity trust Revocable trust Lead trust

Charitable Gift Annuity (select one): Immediate Deferred

IRA or retirement plan (please describe): _____

Other (please describe): _____

I/We have provided will provide Des Moines University a copy of that portion of my/our will(s) or other instrument pertaining to Des Moines University.

Value of Gift

With the understanding that values are subject to change, at this time I/we estimate the value of my/our gift to be approximately \$ _____ in today's dollars*.

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.

STEP 2: PURPOSE OF FUTURE GIFT

This gift is to be unrestricted and may be used where the need is greatest at Des Moines University.

I/We wish to specify that this gift be used for the following purpose(s):

Endowed Expendable Other: _____

Please establish this fund in the following name: _____

STEP 3: ADDITIONAL INFORMATION

DMU may publicize my/our gift to recognize my/our generosity and encourage others to consider a planned gift.

*Name(s) for recognition _____

STEP 4: CONFIRMATION

By signing this Statement of Intent, I/we reaffirm my/our commitment to Des Moines University. However, this letter shall not be binding upon me/us or my/our estate(s).

Donor Signature: X _____ Date: _____

Donor Signature: X _____ Date: _____

*Des Moines University and its employees do not provide tax or legal advice. Prospective donors should consult with their legal and financial advisors. *We hope you will share the approximate amount of your gift with us so the benefiting college or program will know of your generosity and recognize you appropriately. It is helpful to have any supporting documentation you may be able to share with us on file. Please attach if possible. If you have questions, please call (515) 271-1454 or e-mail donations@dmu.edu.*