



Legacy Gift Intention Form

In recognition of Marshall University's legacy of educational excellence, and with the belief that this legacy is worth preserving and passing on to new generations of students, I/We have taken or will take steps to make the gift described below to the Marshall University Foundation, Inc. (the Foundation).

Name: _____

Name (spouse, if applicable): _____

Description of Gift (type/value):

- Bequest through will/trust: percentage of estate _____ specific amount \$ _____ Charitable Trust Remainder Trust Lead Trust Charitable Gift Annuity IRA or Retirement Plan (please describe) _____ Other (please describe) _____

Estimated Value \$ _____ The Foundation recognizes that your circumstances and the estimated gift values you provide can change over time and appreciates details of your arrangements to help insure that your wishes are followed. The Foundation would welcome for our confidential records, a copy of your document, or the appropriate section(s) thereof, in order to assure the Foundation's continued ability to fulfill your intentions.

Purpose of Future Gift:

- This gift is to be unrestricted and may be used where the need is greatest at Marshall University This gift is to be used for the following: _____ Other: _____

Other information you would like to share with us (e.g. any contingency provisions related to the gift, contact information of your estate planning advisor, etc.): _____

Donors who inform the Foundation of a legacy gift will be welcomed into the Old Main Society:

Please list my/our name(s) as: _____ I/we wish this gift to remain anonymous

I/We understand this form does not create a binding obligation and any details about my/our gift will remain confidential. While I/we consider that I/we have an intention to make this gift, I/we reserve the right to adjust or cancel it in the event of a change in circumstances.

Signature _____ Date _____ Signature _____ Date _____