



CONFIDENTIAL PLANNED GIVING STATEMENT OF INTENT

PERSONAL INFORMATION

Name _____ Name _____
 Home address _____ City _____ State _____ Zip _____
 Email _____ Phone _____

TERMS

1. I/we are happy to declare that the Cleveland State University Foundation will receive a future gift through one or more of the following methods:

Type of Gift

- Will/Trust
- Stock Portfolio
- Retirement Plan Assets – IRA, 401(k), 409(b)
- Charitable Remainder Trust
- Life Insurance
- Other _____

The estimated current value of my/our gift is

\$ _____.

OR

_____ % representing an estimated current value of

\$ _____.

2. Attached is a copy of the applicable excerpt of my/our will, trust, beneficiary designation form or other planning document that allows the CSU Foundation to review the language and confirm my/our wishes can be carried out as intended.

3. I/we direct this future gift to be used for the following purpose(s): _____

4. The Cleveland State University Foundation acknowledges that this gift is fully revocable and the specifics of my gift will be treated as confidential.

- I/we allow the University to include my/our name with other donors in the University's campaigns and similar listings.
- I/we prefer to remain anonymous.

SIGNATURES

_____ Date

_____ Date

The Cleveland State University Foundation:

Julie M. Rehm _____ Date
 Executive Director

Thank you for your commitment to higher education!

As with any decision involving your estate plans, we urge you to consult your professional advisors when considering a planned gift to The CSU Foundation.