



WESTERN
COLORADO UNIVERSITY
FOUNDATION

CONFIDENTIAL STATEMENT OF PLANNED GIFT PROVISION

Part 1: Gift Information

As an indication of my/our support of Western State Colorado University, I/we am/are pleased to certify that I/we have made a planned gift provision for the Western State Foundation through a: **(Please check all that apply and provide other information as necessary.)**

___ **Charitable Bequest** in (my/our) Will or Living Trust:

___ Specific bequest of _____ (indicate whether specific cash amount, securities, or real or personal property.)

___ Percentage bequest of _____ % of my/our estate.

___ Residuary or remainder bequest of my/our estate.

___ Contingency bequest naming my/our heir(s) as primary beneficiary(ies) and the Foundation as secondary beneficiary should my/our heir(s) predecease me/us.

___ **Life Insurance Policy:**

___ I/we have named the Foundation as beneficiary of _____ (indicate issuer and policy number) valued at \$ _____.

___ I/we have made the Foundation the irrevocable beneficiary and owner of _____ (indicate issuer and policy name) valued at \$ _____.

___ **Charitable Trust Arrangement:**

___ I/we have made the Foundation the charitable beneficiary of a Charitable Remainder Unitrust.

___ I/we have made the Foundation the charitable beneficiary of a Charitable Remainder Annuity Trust.

___ I/we have made the Foundation the charitable beneficiary of a Charitable Lead Trust.

___ **Retirement Plan:**

___ I/we have made the Foundation the beneficiary of my/our retirement plan(s).

___ Provisions of my/our planned gift direct that it will be utilized as an unrestricted gift to meet the most pressing needs facing Western State Colorado University as determined by the Board of Directors of the Western State Foundation.

___ Provisions of my/our planned gift direct that it will be utilized for the following purpose(s): _____.

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With the understanding that the ultimate value of my/our future charitable gift provision is subject to change, **I/we expect my/our future provision to be valued at approximately \$**_____.

Part 2: Personal Information

(Please check all that apply and provide other information as necessary.)

___ I/we would like to have my/our name(s) recognized in **The Heritage Society** along with those other people who have chosen to actively secure Western's future.
Name(s) _____
Birthdate(s) _____

___ I/we would prefer that my/our name(s) **not** be recognized in The Heritage Society and that my/our gift be cited only as an anonymous gift made to secure Western's future.

___ To ensure that my/our future gift provision is fully understood and that it will be processed smoothly, I/we are attaching a copy of the pertinent legal documentation detailing my/our gift provision.

___ Please send a copy of this Confidential Statement of Planned Gift Provision to my/our professional and/or legal advisors.

Name _____
Address _____
City/State/Zip _____
Phone _____

It is fully understood that this Confidential Statement of Planned Gift Provision is not binding upon me/us or upon my/our estate.

Donor Signature

Date

Donor Signature

Date