

# Planned Giving

## ESTATE INTENTION LETTER



### STATEMENT OF ACCEPTANCE (Please print name in space below.)

\_\_\_\_\_ have/has established a deferred gift for the ultimate benefit of the Kent State University Foundation for the \_\_\_\_\_ campus. By completing this form, I/we accept membership in the Herrick Society.

### TYPE OF GIFT

- Bequest in Will or Trust:  
\_\_\_\_\_ % of estate; \_\_\_\_\_ % of residuary estate;  
\_\_\_\_\_ specific dollar amount or items
- Retirement Account Designation  
Account number and information: \_\_\_\_\_
- Life Insurance Beneficiary Designation  
Policy number, insurer and type of policy: \_\_\_\_\_
- Gift of Life Insurance Policy  
Policy number, insurer and type of policy: \_\_\_\_\_
- Gift Annuity       Charitable Remainder Trust       Life Estate

ESTIMATED CURRENT VALUE OF GIFT \_\_\_\_\_

### GIFT PURPOSE

- Unrestricted to allow the Kent State University Foundation flexibility to direct funds to greatest needs
- Restricted for the following purpose(s): \_\_\_\_\_

### DONOR LISTING

- I/we agree to be included in all Herrick Society, Kent State and Kent State University Foundation publications, listed as (gift amount never disclosed): \_\_\_\_\_
- I/we wish for our gift commitment to remain confidential
- I/we wish for our gift commitment to remain anonymous

SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_

SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_

ADDRESS \_\_\_\_\_

EMAIL \_\_\_\_\_ PHONE \_\_\_\_\_



ATTORNEY OR FINANCIAL PLANNER *optional* \_\_\_\_\_

Please return to Center for Gift and Estate Planning • PO Box 5190 • Kent, OH 44242-0001;  
Scan/email to [giftplan@kent.edu](mailto:giftplan@kent.edu); or fax to 330-672-3275. Federal Tax ID# 34-657-6307