



LETTER OF INTENT FOR FUTURE ESTATE GIFT

Please Note: The UW-Whitewater Foundation, Inc. is a 501(c)(3) organization.

Our full legal name is UW-Whitewater Foundation, Inc.

Our federal EIN number is 39-6081189.

DOCUMENTING AN ESTATE GIFT

On behalf of the students and faculty members at UW-Whitewater, thank you for your interest in including UW-Whitewater in your estate plans. A planned gift to support UW-Whitewater will make a great impact while also supporting an important philanthropic goal for you.

While this gift will be realized in the future, providing documentation now can have a significant positive impact for the university's reputation while ensuring your wishes are fulfilled.

UW-Whitewater Foundation, Inc. is the official charitable arm of the University and is responsible for ensuring that gifts are managed appropriately and in accordance with donor wishes.

We would be grateful if you could:

- Complete a Letter of Intent, sharing with us a conservative estimate of your provision's present value.
- Provide appropriate documentation in which your gift to **UW-Whitewater Foundation, Inc.** is mentioned (*information irrelevant to UW-Whitewater can be concealed*).

As evidence of my desire to provide a legacy of support to the UW-Whitewater Foundation, Inc., I hereby inform the Foundation I have made a provision for a gift to benefit the University in my estate plans.

THE UW-WHITewater FOUNDATION PURSUES THE HIGHEST ETHICAL AND PROFESSIONAL STANDARDS IN FUNDRAISING ENDEAVORS.

WE BELIEVE INTEGRITY IS OF UTMOST IMPORTANCE AND THUS PRIORITIZE DONOR CONFIDENTIALITY TO THE HIGHEST STANDARD.

Name of Donor

Address

City, State, Zip

Phone

Email

It is my intention to leave a legacy to the UW-Whitewater Foundation, Inc., through my:

Will

Retirement Plan Assets

Life Insurance Policy

Living Trust

Charitable Remainder Trust

Other

I wish to inform the Foundation, the current value of my planned gift is approximately \$

(If your gift is a percentage of your estate, please indicate the approximate present value of that percentage.)

It is my intent that this gift be used to benefit the

Please feel free to contact the Foundation at 262-472-1105 for more information or additional fund opportunities. You may also ask to speak with a gift officer to discuss options for a:

Special purpose endowment, personalized (named) scholarship or gift agreement

Signature

Date

I prefer this gift to be anonymous.

Please fill in, print, sign and date the Letter of Intent and mail along with the supporting documentation to:

**President
UW-Whitewater Foundation, Inc.
800 W Main St., Alumni Center
Whitewater, WI 53190**