

## CONFIDENTIAL CHARITABLE BEQUEST INTENT FORM

The purpose of this form is to share the details of your bequest intentions for Messiah University. In recognition of your disclosure, we are pleased to invite you to join Messiah's Heritage Society, a select group of alumni and friends who have included the University in their estate plans.

While unrestricted gifts allow the University to allocate funds to areas of greatest need, you may designate your bequest for a particular purpose or use by a specific school, program or activity at Messiah.

### Bequest specifics:

As evidence of my/our desire to provide a legacy gift for Messiah University, I/we wish to inform Messiah University that it has been named in my/our estate plans. Provided below is the nature of the gift; i.e. percentage or amount of estate, beneficiary of life insurance or qualified retirement plan such as 401K, 403(b), IRA or gift from a trust. A copy of the relevant provision of my will, trust or beneficiary designation form is attached. *(While not required, this information is helpful for Messiah's long-term planning and to ensure that we appropriately honor your wishes).* I will notify the University if changes are made to this/these provision(s).

Nature of gift: \_\_\_\_\_

\_\_\_\_\_

Designation: \_\_\_\_\_

\_\_\_\_\_

Approximate value of bequest intention: \$ \_\_\_\_\_

- ☐ I am considering including Messiah University in my estate plans.
- ☐ At this time, I have not included Messiah University in my estate plans.
- ☐ I would like to discuss options that I may share with my financial advisors.

\_\_\_\_\_  
Name

\_\_\_\_\_  
Date

\_\_\_\_\_  
Name

\_\_\_\_\_  
Date