



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. Knowing bequest intentions enables the University to better plan for its financial future and to be the best steward of donor resources. 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 of changes made to this/these provision(s).

Description:

Heritage Society:

In recognition of your intention, Messiah University will enroll you in the Heritage Society. The Heritage Society was established to honor all donors who include Messiah in their estate plans.

- Yes, you may publicize my/our name(s) as member(s) of the Heritage Society, which serves as a motivation for others to consider heritage gifts in support of Messiah University and also helps the University to plan for the future.
- I/we prefer my/our intentions to remain anonymous.

Donor name/signature

Date

Donor name/signature

Date