



CONFIDENTIAL PLANNED GIVING STATEMENT OF INTENT

PERSONAL INFORMATION

Name _____ Name _____
Home address _____ City _____ State _____ Zip _____
Email _____ Phone _____

TERMS

1. I/we are happy to declare that the Cleveland State University Foundation will receive a future gift through one or more of the following methods:

Type of Gift

- ☐ Will/Trust
☐ Stock Portfolio
☐ Retirement Plan Assets – IRA, 401(k), 409(b)
☐ Charitable Remainder Trust
☐ Life Insurance
☐ Other _____

The estimated current value of my/our gift is

\$_____.

OR

_____ % representing an estimated current value of

\$_____.

2. Attached is a copy of the applicable excerpt of my/our will, trust, beneficiary designation form or other planning document that allows the CSU Foundation to review the language and confirm my/our wishes can be carried out as intended.

3. I/we direct this future gift to be used for the following purpose(s): _____

4. The Cleveland State University Foundation acknowledges that this gift is fully revocable and the specifics of my gift will be treated as confidential.

- ☐ I/we allow the University to include my/our name with other donors in the University's campaigns and similar listings.
☐ I/we prefer to remain anonymous.

SIGNATURES

Date

Date

The Cleveland State University Foundation:

Chad Warren
Executive Director

Date

Thank you for your commitment to higher education!

As with any decision involving your estate plans, we urge you to consult your professional advisors when considering a planned gift to The CSU Foundation.

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