

DECLARATION OF ESTATE GIFT INTENT

Sharing this information helps us ensure your wishes are understood and can be completed as intended, provides insight that helps PSU's long-range planning and budgeting, and allows us to recognize and celebrate your intended commitment today.

[I am/We are] pleased to inform the Portland State University Foundation that [I/we] have provided for a gift of:

_____%, valued at approximately \$_____. approximately \$_____.

Designated through a:

- provision in [my/our] will. retirement account beneficiary designation.
- provision in [my/our] trust. other estate gift arrangement: _____.

[I/We] direct that [my/our] gift be used for the following purpose(s)*:

**To create a new fund with your gift, or learn more about existing funds your gift could be allocated to please contact us for support.*

The value of [my/our] estate gift may be counted toward the PSU Foundation's fundraising goals. The PSU Foundation acknowledges that this is not a binding pledge and may not be enforced against [my/our] estate.

- Attached is the portion of [my/our] will, trust or other provision pertaining to this gift to PSU Foundation. (optional)
- This gift is in [honor memory] of _____.

For recognition purposes related to this gift,

- the donor(s) shall be identified as "_____."
- please do not list [my/our] name in any publication or donor listing; this commitment should appear as "Anonymous."
 - during [my/our] lifetime(s) only. during and after [my/our] lifetime(s).

Donor Name

Donor Signature

Birth Date

Donor Name (N/A if one signer)

Donor Signature

Birth Date

HOW TO MAKE A BEQUEST

Thank you for including PSU in your estate plans! As with any decision regarding your estate, we encourage you to seek the advice of professional counsel when considering a gift to the Portland State University Foundation.

If you already have a will or trust, review the documents to determine if any changes in your family or other circumstances warrant revising the document. If you wish to add Portland State University Foundation for a gift in your existing will or trust, contact the attorney who drafted the document and request a simple amendment.

If you don't have a will or trust, contact a competent attorney to have these documents prepared. If you don't know who to contact, seek a recommendation for an estate planning attorney from family members, friends, or colleagues at work. You may also contact your local bar association lawyer reference service for a referral. See sample bequest language below.

SAMPLE BEQUEST LANGUAGE

"I give to Portland State University Foundation, a Oregon non-profit (Tax ID #93-0619733), or its successor, the sum of [DOLLAR AMOUNT], for any purpose as Portland State University Foundation deems appropriate."

"I give to Portland State University Foundation, a Oregon non-profit (Tax ID #93-0619733), or its successor, [PERCENTAGE] of the rest of my estate, for any purpose as Portland State University Foundation deems appropriate."

"I give to Portland State University Foundation, a Oregon non-profit (Tax ID #93-0619733), or its successor (the real estate located at [PROPERTY] or 1000 shares of [STOCK NAME] stock), for any purpose as Portland State University Foundation deems appropriate."

ESTATE CONTACTS & HEIRS

Please list any personal contacts you think are relevant to your plans with us, for example, an executor/trustee or any heirs or surviving family members you'd like us to stay in contact with about your gift. If you have any heirs who should receive stewardship materials that communicate the impact of your legacy gift, please note this below.