

# EPLER SOCIETY RECOGNITION FORM

Thank you for your generous support of Portland State University Foundation through your future gift. We are honored by your commitment to inspiring our students and faculty, and we deeply appreciate your dedication to making a lasting impact.

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My/Our gift is from:

will/trust      donor advised fund      IRA/other retirement plan beneficiary      other: \_\_\_\_\_

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

[I/We] prefer to be recognized as:

Please do not list [my/our] name in any publication or donor listing:

This gift will remain anonymous at all times

This gift is anonymous only during [my/our] lifetime(s)

This gift is anonymous after [my/our] lifetime(s)

This gift is in memory/honor of \_\_\_\_\_

Based on my/our current plans PSU Foundation is named to receive:

the sum of \$ \_\_\_\_\_

\_\_\_\_\_ % of my trust/estate (with a current estimated gift value of \$ \_\_\_\_\_ to PSU Foundation)

*This will be used for informational purposes only and is not legally binding*

Attached is the portion of [my/our] [will/trust] or other document related to this gift to PSU Foundation (optional)

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Donor Name

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Donor Name (N/A if one signer)

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Donor Signature

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Date

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Date

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Donor Signature

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Birth Date

# HOW TO MAKE A BEQUEST

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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.

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**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.