



OGLETHORPE

UNIVERSITY

LETTER OF INTENT FOR BENEFICIARY DESIGNATIONS IN WILLS, LIVING TRUSTS, IRAS, RETIREMENT PLANS, AND LIFE INSURANCE

If you have made provisions in your estate for a gift to Oglethorpe University, please complete the form below and return it to us. If you are comfortable sharing documentation of your estate gift, please include such documentation with this form to enable us to more effectively steward your gift. The details on this form as well as any additional information you share with us will remain confidential. Thank you for your confidence and commitment to Oglethorpe's future growth and success.

Gift Designation/Use:

Name(s)

Please check the box if you wish to remain anonymous

Address

City, State

Zip

Phone

Email

Relationship with the University (alumnus/a, parent, friend, etc.)

To support the advancement of Oglethorpe University and its mission, I/we have made provision for a gift to the university in my/our estate plan as follows:

- Will or Bequest IRA, pension, or other retirement account* Charitable Lead Trust
- Stock or Property Revocable Living Trust Insurance beneficiary**
- Other (please specify): _____ Approximate current value of the gift: _____

The following individual(s) are designated as contacts regarding this gift if the Donor is unavailable:

_____ Relationship to donor: _____ Phone/Email: _____

_____ Relationship to donor: _____ Phone/Email: _____

I acknowledge that any naming is and shall be subject to Oglethorpe's policies and procedures as in effect from time to time, including the minimum funding threshold for an endowed fund. If a gift intended to establish an endowment does not meet the established threshold, Oglethorpe may establish an expendable fund for the same purpose. Further, if, in the determination of the Oglethorpe President in consultation with the Oglethorpe Board of Trustees, future circumstances change so that the gift purpose becomes illegal, impractical, or can no longer be carried out, the Oglethorpe President, in consultation with the appropriate department, academic or administrative leadership, may designate an alternative use for a purpose or purposes as similar as possible to my original intent.

Signature

Date

*Please estimate the current dollar value if your gift is based on a percentage of your estate, IRA, etc.

**The university may not also be designated as the policyholder.

Oglethorpe understands that this letter of intent does not create a legally binding obligation on you or your estate to fulfill the gift. You may choose to increase, decrease, or revoke this bequest at any time, at your sole discretion. However, we would be grateful if you would inform the university should you change your intent or should the dollar value of your estate's potential donation significantly increase or decrease.