

Deferred Gift Intent Notification

Date _____

This is not a pledge or promise to give. Rather, this form compiles helpful information for appropriate administration of your deferred charitable gift. This form is a record of your intent – a donor-approved reference for future use. Your signature verifies accuracy of information on the date signed. Because details and monetary value of deferred gifts change over time, please inform LDS Philanthropies staff of substantive changes.

Donor Name (Printed) _____

Donor Signature _____

Birth Date of Donor _____

Donor Name (Printed) _____

Donor Signature _____

Birth Date of Donor _____

BENEFICIARY INSTITUTION OR FUND (mark all that apply)

- | | |
|--|--|
| <input type="checkbox"/> Brigham Young University | <input type="checkbox"/> Church General Fund |
| <input type="checkbox"/> Brigham Young University – Hawaii | <input type="checkbox"/> Humanitarian Services (LDS Charities) |
| <input type="checkbox"/> Brigham Young University – Idaho | <input type="checkbox"/> General Missionary Fund |
| <input type="checkbox"/> LDS Business College | <input type="checkbox"/> Self-Reliance Services/Perpetual Education Fund |
| | <input type="checkbox"/> Family History/FamilySearch |
| | <input type="checkbox"/> Other: _____ |

GIFT TYPE

- | <input type="checkbox"/> Will (Please circle type) | Specific Amount | Specific Percentage | Residual | Contingent |
|--|-----------------|---|----------|------------|
| <input type="checkbox"/> Revocable Trust | | <input type="checkbox"/> Charitable Gift Annuity | | |
| <input type="checkbox"/> Life Insurance (institution as owner) | | <input type="checkbox"/> Deferred Gift Annuity | | |
| <input type="checkbox"/> Life Insurance Beneficiary | | <input type="checkbox"/> Donor Advised Fund | | |
| <input type="checkbox"/> Retirement Account Beneficiary | | <input type="checkbox"/> Charitable Remainder Trust | | |
| | | <input type="checkbox"/> Other _____ | | |

GIFT VALUE ESTIMATE \$ _____

GIFT PURPOSE

- My/our gift is unrestricted to help the institution or fund achieve its most important goals.
- My/our gift is designated for the following purpose(s):
- _____

LEGACY SOCIETY

Deferred gifts to a Church educational institution qualify donors for membership in its legacy society, created to recognize donors who choose a deferred gift to support the institution in upholding its mission. You will join other alumni and friends who have established similar deferred gifts.

LDSP STAFF

Name of LDS Philanthropies staff member assisting in completion of this form: _____