

GIFT INTENT FORM

As evidence of my desire to provide a legacy of support to Barry University, I hereby inform Barry University that I have made provision for a gift to the University in my estate. I understand that this commitment can be modified by me at any time. Please consult with your legal and financial advisor for tax or legal advice.

Full Name _____ Date of Birth _____
Address _____ SSN _____

Description of Gift (Type/Value)

Bequest through Will/Trust:

Percentage of Estate: _____

Specific Amount \$: _____

Other (please specify): _____

Charitable Trust (select one):

Unitrust

Annuity Trust

Revocable Trust

Lead Trust

Charitable Gift Annuity (select one):

Immediate

Deferred

IRA or Retirement Plan (please describe): _____

Other (please describe): _____

It is my intent that this gift commitment remains confidential.

I ____ have provided ____ will provide Barry University a copy of the portion of my will or other instrument (beneficiary designation form) that pertains to Barry University.

Barry University kindly requests that you provide an estimated gift amount to acknowledge your generosity during your lifetime. With the understanding that values are subject to change, at the time, I estimate the value of my gift to be approximately \$ _____ in today's dollars.

I understand that, by stating an amount, this statement does not legally bind my estate, and I may choose to modify this bequest at any time, at my sole discretion.

Purpose of Future Gift:

I wish to designate this gift to the Barry Success Fund to advance University priorities at the discretion of the VP of Advancement and President of Barry University.

I wish to specify that this gift be used for the following purpose(s):

Donor Signature _____

Date: _____

If you have questions, please contact:

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