

DELAWARE STATE UNIVERSITY FOUNDATION, INC.

Declaration of Future Intent

We thank you for your intention to include the Delaware State University Foundation in your estate plan. We ask that you complete this form with as much detail as you are willing to share. Any information about your gift will remain confidential and does not create a binding obligation.

By documenting your intention to include DSU in your estate plans, you become a member of the Delaware State University Legacy Society, which includes invitations to special programs throughout the year and University-level recognition for your generosity.

Of course, this intention form is revocable, should you need to alter your will at any time. And finally, we encourage all of our donors to consult with trusted tax and financial professionals to help you make the right decision for you and your family.

New Intention

Updated Intention

My/Our Information

Name (print): _____ Spouse Name (if joint gift): _____

Address: _____ City: _____ State: _____ Zip Code: _____

Phone: _____ Email Address: _____

Gift Information:

I/We have provided a gift to the Delaware State University Foundation as set forth in my/our:

- Will or Trust
- Life Insurance Policy
- Other Asset(s) (please describe): _____
- Charitable Gift Annuity
- Charitable Remainder Unitrust

- Retirement Plan or Beneficiary Designation (401(k), 403(B), IRA, Brokerage Account)
- Delaware State University is a contingent beneficiary of the indicated asset above (Please Explain):

The current estimated value of my/our gift is \$_____. My/Our gift is _____% of the asset indicated above. If a percentage is given, the current estimated value of the percent in today’s dollars is \$_____.

Gift Purpose:

Gift Agreement - I/We have signed a Gift Agreement with the Delaware State University Foundation stating the designation or purpose for this gift.

I/We have not signed a Gift Agreement – It is my/our intention that the Delaware State University Foundation use this future gift for (briefly describe the school, college, program, or fund you would like your gift to benefit. If multiple areas, please provide percentages or specific amounts):

Recognition:

Donors who provide a planned gift to the benefit of the Delaware State University Foundation will be enrolled in the DSU Legacy Society.

I/we prefer no public recognition Please list my/our name(s) as follows:

Estate Contact Information: Although optional, the following information is very helpful:

Executor, Trustee (if your gift is through a Will, Trust):

Name: _____

Address: _____

City, State: _____, Zip Code: _____

Phone: _____

Email: _____

Administrating Company (i.e. Fidelity, Vanguard, The Hartford, etc., if your gift is through a retirement account or life insurance policy):

Name: _____

Address: _____

City, State: _____, Zip Code: _____

Phone: _____

Email: _____

Additional Contact/Relationship you may want us to know (family, attorney, etc.)

Name: _____ Relation: _____

Address: _____ City, State: _____ Zip Code: _____

Phone: _____ Email: _____

I/We understand this form does not create a binding obligation and any details about my/our gift will remain confidential. The Delaware State University Foundation understands that the size of my/our future gift may change.

Signature: _____ **Spouse Signature (if joint):** _____

Date: _____

Once completed and signed, please send this form to:

Justin Rodstrom, Director of Major Gifts
Phone: 302.242.2784
Email: jrodstrom@desu.edu

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