



STATEMENT OF INTENT

Thank you for sharing your intention to include Kettering University in your estate plan. By completing this **Statement of Intent** form, you are indicating that you have made a gift for the benefit of Kettering University. These confidential statements and estimates are offered to assist Kettering University to record and to project future financial support and gift expectancies. It is not a binding legal obligation upon your estate.

Bequest via Will(s) or Personal Trust(s):

- Outright Surviving Spouse

Charitable Trust:

- CRUT CRAT LEAD

Charitable Gift Annuity:

- Current Deferred

Life Insurance:

- New Policy Existing Policy

Bequest of Property:

Type of Property: _____

Location/Address: _____

Beneficiary of Retirement Plan Assets:

- Death of Plan Participant

- Surviving Spouse

Other: _____

Donor Advised Fund (DAF) with: _____

It is understood values are subject to change, but I estimate the present value of my/our provision to be approximately \$ _____. My/our provision is a *percentage* or *fixed gift amount*. (Please Circle One.)

I wish my/our future gift to be used for:

- The area of greatest need within Kettering University

- The area of greatest need within the College or School of _____

- Other: Specify scholarships/fellowships, research, special projects, etc... _____

Documentation: A copy of the provision is attached. A copy of the provision will be sent when executed.

Recognition:

- For recognition purposes, please list my/our name(s) as follows:

- I would like this planned gift to be anonymous.

Donor(s) Name(s): _____

Signature(s): _____

Date: _____

Birth Date(s) Required: _____

Comments, notes: _____

Please Return To:
Kettering University
1700 University Avenue
Flint, MI 48504-6214
Phone: (810) 762-9746

Office of Gift Planning Use Only:
Present Value of Future Gift: \$ _____
Gift Acknowledgement Date: _____ Entity ID#: _____
Version: 2017-05-02