



HERITAGE SOCIETY Declaration of Charitable Bequest

I/we wish to make known our intentions of an estate pledge that we have arranged for the benefit of Avila University.

Name(s) _____

Address _____

City _____ **State** _____ **ZIP** _____

Phone _____ **E-mail** _____

The fulfillment of this commitment will be made possible through the following instrument (s):

- | | |
|---|--|
| <input type="checkbox"/> Bequest in will or trust | <input type="checkbox"/> Life insurance policy |
| <input type="checkbox"/> Charitable remainder trust | <input type="checkbox"/> Retirement plan funds |
| <input type="checkbox"/> Charitable lead trust | <input type="checkbox"/> Charitable gift annuity |
| <input type="checkbox"/> Other _____ | |

Estimated present value of this commitment to Avila University is \$ _____

A copy of the will, or portion that pertains to Avila University, is attached. ☐ Yes ☐ No

My/our estate pledge shall be designated to support my/our interest in the following area(s):

- | | |
|--|----------|
| <input type="checkbox"/> Unrestricted use at Avila University | \$ _____ |
| <input type="checkbox"/> *Avila University Endowment Fund for Scholarships | \$ _____ |
| Designated area: _____ | |

**Please note: We ask that creation of a named endowment upon bequest completion has completed/signed establishing paperwork on file with Avila University. Please contact the Avila Department of Advancement at (816) 501 - 3602 to complete.*

- | | |
|---|----------|
| <input type="checkbox"/> Other (please specify) | \$ _____ |
|---|----------|

We understand that Avila University is a nonprofit organization as described under 501(c)(3) of the Internal Revenue code and our gift may be tax-deductible.

Signature of Donor(s): _____ Date: _____

_____ Date: _____