



Avila University Statement of Legacy Commitment

Leaving a Legacy at Avila University

A legacy gift is a meaningful way to reflect the role Avila University has played in your life and to help ensure that future generations of students can experience an Avila education.

By completing this statement, you are letting Avila University know that you have included Avila in your estate plans. Your commitment allows us to thank you, recognize you as a member of the Avila University Heritage Society, and better understand the future impact of our community of supporters.

My Legacy Commitment

I/we have made provisions in my/our estate plan to benefit: _____

Avila University

My/our gift is intended to be:

- ☐ A specific dollar amount of \$ _____
- ☐ _____ % of my/our estate
- ☐ The residue or a portion of the residue of my/our estate
- ☐ A percentage or portion of a retirement account
- ☐ A percentage or portion of a life insurance policy
- ☐ Other: _____

The approximate current value of my intended gift is \$ _____.

I understand that the value of a future gift may change over time depending upon the value of the assets comprising my estate.

Revocability of My Gift

Please indicate the status of the gift described above:

- ☐ **Revocable** — I understand that I may change or revoke this provision in my estate plan at any time, subject to the terms of my estate planning documents.
 - ☐ **Irrevocable** — I understand that this gift has been established as an irrevocable commitment through my estate plan or a separate legally binding agreement, and that I may not change or revoke the gift except as permitted by the governing document or applicable law. *(Additional documentation needed)*
 - ☐ **I am unsure** — I would like to discuss the nature of my planned gift with Avila University.
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Sharing My Intentions

To help Avila University understand and honor my wishes, I have attached or provided the following documentation:

- ☐ Relevant portion of my will or trust
- ☐ Beneficiary designation confirmation
- ☐ Letter from my attorney or financial advisor
- ☐ Other documentation: _____
- ☐ I prefer not to provide documentation at this time.

Recognition

I/we would like to be recognized as a member of the Avila University Heritage Society.

- ☐ Yes
- ☐ No, please keep my legacy commitment anonymous.

Preferred name(s) for recognition: _____

I understand that this statement documents my present intention to benefit Avila University through my estate plan. The information provided does not amend my will, trust, beneficiary designation, or other estate planning documents, and I may change my plans in the future unless my gift has been separately established as irrevocable through a legally binding agreement or other appropriate documentation.

I have provided this information so that Avila University may appropriately record and steward my legacy intention and honor my wishes to the greatest extent possible.

I understand that this statement is not a charitable contribution acknowledgment or receipt and does not establish a current charitable tax deduction. Avila University does not provide legal, tax, or financial advice. I have been encouraged to consult with my attorney, financial advisor, tax professional, or other qualified advisor(s) regarding my estate plan and the legal and tax consequences of my charitable intentions.

Donor Name: _____

Signature: _____

Date: _____

Donor Name (if applicable): _____

Signature: _____

Date: _____

Thank you for considering Avila University as part of your legacy. Your generosity can help ensure that Avila's mission continues to make a difference for generations of students.