

CONFIDENTIAL CHARITABLE ESTATE GIFT INTENTION



VILLANOVA
UNIVERSITY
Office of Gift & Estate Planning

Thank you for planning to make a charitable estate gift to support the future of Villanova University. Completing, signing, and returning this form allows us to thank you for your thoughtful generosity, and honor how you would like your gift to be used. Please attach any documents from your estate plans that you are comfortable sharing. The nature and size of your gift will be kept strictly confidential.

Name: _____ Name: _____

Class Year: _____ Class Year: _____

Date of Birth: _____ Date of Birth: _____

Address: _____

City, State, Zip: _____

Email: _____ Phone: _____

I/WE HAVE NAMED VILLANOVA UNIVERSITY AS A BENEFICIARY IN ONE OR MORE OF THE FOLLOWING:

- | | | |
|--|---|---|
| <input type="checkbox"/> Will | <input type="checkbox"/> IRA or Retirement Plan | <input type="checkbox"/> Charitable Remainder Trust |
| <input type="checkbox"/> Life Insurance Policy | <input type="checkbox"/> Real Estate/Retained Life Estate | <input type="checkbox"/> Revocable or Living Trust |

Other (please explain) _____

Approximate Current Value: _____

Gift Designation: _____

Comments: _____

Please indicate whether you would like to be publicly listed as a member of the 1842 Heritage Society: Yes No

Villanova University honors its donors of charitable estate gifts with membership in the 1842 Heritage Society. Your gift will sustain the Augustinian tradition of Veritas, Unitas, Caritas that began with the founding of the University in 1842.

This document does not bind you or your estate. You may choose to increase, decrease, or revoke this charitable estate gift at any time, at your sole discretion. We ask that you make every reasonable attempt to inform Villanova if you change your intent and/or if the value of your estate gift intention changes.

Signature: _____

Date: _____

Signature: _____

Date: _____

PLEASE RETURN THE COMPLETED FORM TO:

The Office of Gift and Estate Planning, Villanova University, 800 Lancaster Avenue, Villanova, PA 19085
800.486.5244 | giftplanning@villanova.edu | Tax ID: 23-1352688