

# Planned Giving

## ESTATE INTENTION LETTER



STATEMENT OF ACCEPTANCE (Please *print* name in space below.)

\_\_\_\_\_ have/has established a deferred gift for the ultimate benefit of the Kent State University Foundation for the 89.7 WKSU. By completing this form, I/we accept membership in the Herrick Society.

### TYPE OF GIFT

- |  |  |                                      |
|--|--|--------------------------------------|
| <input type="checkbox"/> Bequest in Will or Trust:<br>_____ % of estate; _____ % of residuary estate;<br>_____ specific dollar amount or items | <input type="checkbox"/> Life Insurance Beneficiary Designation<br>Policy number, insurer and type of policy:<br>_____ |                                      |
| <input type="checkbox"/> Retirement Account Designation<br>Account number and information:<br>_____  | <input type="checkbox"/> Gift of Life Insurance Policy<br>Policy number, insurer and type of policy:<br>_____          |                                      |
| <input type="checkbox"/> Gift Annuity  | <input type="checkbox"/> Charitable Remainder Trust  | <input type="checkbox"/> Life Estate |

ESTIMATED CURRENT VALUE OF GIFT \_\_\_\_\_

### GIFT PURPOSE

- Unrestricted to allow the Kent State University Foundation flexibility to direct funds to greatest needs
- Restricted for the following purpose(s): \_\_\_\_\_  
\_\_\_\_\_

### DONOR LISTING

- I/we agree to be included in all Herrick Society, Kent State and Kent State University Foundation publications, listed as (gift amount never disclosed): \_\_\_\_\_
- I/we wish for our gift commitment to remain confidential
- I/we wish for our gift commitment to remain anonymous

SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_

SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_

ADDRESS \_\_\_\_\_

EMAIL \_\_\_\_\_ PHONE \_\_\_\_\_



ATTORNEY OR FINANCIAL PLANNER *optional* \_\_\_\_\_

Please return to Center for Gift and Estate Planning • PO Box 5190 • Kent, OH 44242-0001;  
Scan/email to [giftplan@kent.edu](mailto:giftplan@kent.edu); or fax to 330-672-3275. Federal Tax ID# 34-657-6307

Request a Bequest Program     New Herrick Society Member    Advancement Officer \_\_\_\_\_    CGEP \_\_\_\_\_