

Planned Gift Intention Form

Confidential

UC SANTA CRUZ



Name _____ Date of Birth _____

Significant Other _____ Date of Birth _____

Address _____

Phone _____ E-Mail _____

Signature _____

Date _____

Signature _____

Date _____

I/We have included UC Santa Cruz as a beneficiary of a: (*Check all that apply*)

- | | Confidential Estimated Value |
|---|-------------------------------------|
| <input type="checkbox"/> Will or Living Trust | \$ _____ |
| <input type="checkbox"/> IRA or other retirement account | \$ _____ |
| <input type="checkbox"/> Charitable Gift Annuity or Remainder Trust | \$ _____ |
| <input type="checkbox"/> Life Insurance plan | \$ _____ |
| <input type="checkbox"/> Other | \$ _____ |

My/Our intention is that UC Santa Cruz use this future gift for:

Please help us ensure your intent is fulfilled by attaching copies of the appropriate legal document describing the gift above.

The 21st Century Club

The 21st Century Club honors individuals who have included UC Santa Cruz in their estate plans. Members are recognized in the Honor Roll and are invited to special University events.

Name as you would like it to appear in the Honor Roll

Please keep my gift Anonymous

**UC Santa Cruz Office of Planned Giving - 1156 High Street, UR
Santa Cruz, CA 95064 Phone: 831-459-1045 Fax: 831-459-2601
<http://plannedgifts.ucsc.edu/>**