

**ESTATE INTENTION FORM**  
**Confidential and Nonbinding**

Name \_\_\_\_\_ Class \_\_\_\_\_ Major \_\_\_\_\_ Birth Date \_\_\_\_\_

Name \_\_\_\_\_ Class \_\_\_\_\_ Major \_\_\_\_\_ Birth Date \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_

Telephone (Home) \_\_\_\_\_ (Cell) \_\_\_\_\_ (e-mail) \_\_\_\_\_

**As an indication of my/our support of Samford University, I/we are pleased to indicate that it is my/our intention to provide a gift estimated as follows:**

**Description of Gift (type / value)**

**Bequest through will**

- specific amount \$ \_\_\_\_\_  percentage of estate \_\_\_\_\_  
 other \_\_\_\_\_

**Beneficiary designation**

- savings or checking account     certificate of deposit     investment account  
 life insurance     other \_\_\_\_\_

**Charitable trust (select one)**

- unitrust     annuity trust     revocable trust     lead trust

**IRA or retirement plan beneficiary**

**Gift annuity**

**Other** \_\_\_\_\_

I/We  *have provided*  *will provide*  *choose not to provide* to the Office of Gift and Estate Design a copy of that portion of my/our wills(s) or other instrument that pertains to Samford University.

With the understanding that values are subject to change and that I/we are under absolutely no obligation to honor this estate gift designation, at this time I/we estimate the value of my/our gift to be approximately \$ \_\_\_\_\_ in today's dollars.

This is an update of a previously documented gift plan.

**Purpose of Future Gift**

This gift is to be unrestricted and may be used where the need is greatest at Samford.

I/we wish to specify that the gift be used for the following purpose(s): \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_