



THE JESUIT MERCY FOUNDERS SOCIETY ESTATE GIFT INTENTION

Thank you for your intention to include University of Detroit Mercy in your estate plan. The Jesuit Mercy Founders Society recognizes and honors donors who have demonstrated their commitment to our founders' values and the future of the University with their charitable estate gifts. We invite you to complete this form with as much detail as you are willing to share. Any information about your gift will remain confidential and does not create a binding obligation.

Donor Name (as you wish to be listed):

I prefer to be anonymous _____

What inspired your gift? _____

(use additional pages if desired)

Type of Planned Gift:

Will or Living Trust

Charitable Gift Annuity

Charitable Remainder Trust or Unitrust

Life Insurance Policy

Retirement Plan or Beneficiary Designation
from a 401(K), 403(B), IRA, Keogh or
Brokerage Account

Other Asset(s) (please describe):

This gift is based upon my passing.

This gift is based upon the passing of my spouse/others.

In today's dollars, the current estimated value of my/our gift intention is \$_____.

The gift is: Specific \$ amount Percentage of Estate _____% Other _____

Use of Gift:

Unrestricted; the University's top priorities at that time.

Restricted (Briefly describe the school, college, program, or fund you would like your gift to benefit. If multiple areas, please provide percentages or specific amounts.):

(Please continue on reverse side.)

Additional Items Enclosed:

- Relevant section of my Will/Trust
- Letter from financial or legal advisor
- Beneficiary designation notice

Additional Contact(s) you may want us to know of, i.e., a family member, attorney or advisor:

Name: _____ Relationship: _____

Address: _____ City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

Name: _____ Relationship: _____

Address: _____ City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

I understand this form does not create a binding obligation and any details about my gift will remain confidential. University of Detroit Mercy understands that the size of the future gift may change.

Signature: _____ Date: _____

Contact Information:

Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

Please return this form to:

University of Detroit Mercy
Office of Planned Giving
4001 W. McNichols Road
Detroit, MI 48221-3038

For more information, please contact:

313-993-1600
Email: plannedgift@udmercy.edu