

Planned Gift Intention Form
Confidential



Name _____ Date of birth _____

Phone _____ Email _____

Significant other _____ Date of birth _____

Phone _____ Email _____

Address _____

Signature _____ Date _____

Signature _____ Date _____

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

	Confidential estimated value
Will or living trust	\$ _____
IRA or other retirement asset	\$ _____
Charitable gift annuity or remainder trust	\$ _____
Life insurance plan	\$ _____
Other _____	\$ _____

My/Our intention is that UC Santa Cruz use this future gift for the following purpose(s):

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

UC Santa Cruz Legacy Circle

Individuals who have included UC Santa Cruz in their estate plans are honored by membership in the UC Santa Cruz Legacy Circle and are invited to special university events.

Name(s) as you would like it to appear in the honor roll:

Please keep my gift anonymous

UC Santa Cruz Office of Planned Giving
University Relations
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831-459-5227 | gift.planning@ucsc.edu