

Planned Giving Statement of Intent

This statement is an expression of my intent to provide for the future of the Fromm Institute for Lifelong Learning through a planned or estate gift. The provision(s) made include the following:

_____ A life insurance policy or retirement assets, in which the Fromm Institute for Lifelong Learning is named as beneficiary.

_____ A will or trust agreement in which the Fromm Institute for Lifelong Learning is named as a beneficiary.

_____ Other (please specify) _____

The estimated value of my (our) gift is \$_____.

Recognition*

The Fromm Institute for Lifelong Learning appreciates the opportunity to acknowledge your commitment by publicly recognizing your contribution. If you prefer to remain anonymous, however, we will respect your wishes.

_____ I (we) permit the Fromm Institute for Lifelong Learning to use my/our name(s) in printed lists of planned gifts, which may appear in annual reports, newsletters, website and/or other publications.

_____ I (we) prefer to remain anonymous during my/our lifetime(s). You may recognize my/our gift after you receive it.

_____ I (we) prefer to remain anonymous during and after my/our lifetime(s).

Preferred Donor Listing for Recognition (please print)

Donor 1 Signature

Date

Donor 2 Signature

Date

(Please review the back of this page)

Donor 1 Printed Name:

Address:

City:

State:

Zip Code:

Phone: (H)

(W)

(C)

email:

Date of Birth:

Donor 2 Printed Name:

Address:

City:

State:

Zip Code:

Phone: (H)

(W)

(C)

email:

Date of Birth:

Purpose

It is my wish that the gift be used at the Fromm Institute for Lifelong Learning's discretion, to create the greatest impact in our community by supporting its most compelling needs and opportunities.

Additional Comments/Directives: