



## The George Morris Philips Society Statement of Intent

I/we have provided a legacy for West Chester University through a provision in my/our estate plans.

Full Name

Date of Birth

Address

Preferred Telephone

Preferred Email

### Gift Information

I/we understand that this commitment is revocable and can be modified by me/us at any time, except for those irrevocable gifts listed below. It is my/our intent to include West Chester University in my/our estate plans through the following (*please check one*):

- |   |  |   |
|---|--|---|
| <input type="checkbox"/> Bequest  | <input type="checkbox"/> Charitable Gift Annuity*    | <input type="checkbox"/> Property/Real Estate |
| <input type="checkbox"/> Life Insurance Policy  | <input type="checkbox"/> Charitable Lead Trust*      | <input type="checkbox"/> Other:               |
| <input type="checkbox"/> Qualified Retirement Plan<br><i>(traditional IRA, SEP, 401k, 403b)</i> | <input type="checkbox"/> Charitable Remainder Trust* |   |

*\*Irrevocable gifts involve permanent transfer of assets and require additional documentation.*

### Gift Value (*please check one*):

- I/we wish to inform West Chester University, for long-term planning purposes only, that as of this date, the value of my/our gift is: \$ \_\_\_\_\_.

*Please attach any supporting documentation you are able to share; if your gift is a percentage of your estate, please indicate the approximate current value of that percentage.*

- I/we would rather not disclose the value of my/our planned gift at this time.

### Purpose of Your Gift

It is my/our desire that this gift be used to benefit the following (*please check one*):

- This gift may be used where the need is greatest at West Chester University.
- Designated to (*school, named fund, program*): \_\_\_\_\_

### Recognition

Benefactors who have made estate gifts for the benefit of West Chester University are recognized as members of the George Morris Philips Society (*please check one*):

- Please list me/us as members of the George Morris Philips Society in University publications as follows:

- I/we prefer to remain anonymous and wish not to appear on any recognition lists.

Signature

Date

### THANK YOU FOR YOUR SUPPORT OF WEST CHESTER UNIVERSITY

The WCU Foundation solicits tax deductible, private contributions for the benefit of West Chester University. Please designate West Chester University Foundation as the beneficiary of your gift.

(Tax ID Number is 23-3054174)