Letter of Intent - Estate Gift

As an expression of my / our commitment to Case Western Reserve University, its educational mission and its fundraising goals,

I/we, ____________________________________________________________, hereby commit to Case Western Reserve University a gift □ in the sum of ____________, □ in the range of ____________, or □ in an amount TBD which is to be classified as a gift to: □ endowment, □ operating, or □ building.

I/We intend** to make a planned gift through:

□ Bequest  □ Life Insurance Beneficiary Designation  □ Retirement Plan Beneficiary Designation  □ Trust

□ Other, please describe ____________________________________________________________

If sufficient funds are received upon my/our passing, I/we intend our gift to support:

□  □ Named, Endowed Scholarship: Minimum $25,000*
□  □ Named, Endowed Professorship: Minimum $1.5 million*
□  □ Named, Endowed Lectureship: Minimum $100,000*
□  □ Other _____________________________

If my/our gift, when realized, is insufficient to establish an endowment at the indicated levels, I/we prefer that in the alternative, the gift be used to support: ________________________________

Public acknowledgment of your philanthropy is motivating and exemplary to others.

May the university publish your name as a contributor? □ Yes □ No

May the university disclose the amount of your contribution? □ Yes □ No

Please confirm your preferred recognition name exactly as you wish for it to be listed: ________________________________

Donor signature ____________________________ date ____________

Donor signature ____________________________ date ____________

Acknowledging University Official signature ____________________________ date ____________

*Minimums effective July 1, 2021
** This is not a binding estate commitment.