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.

Additional Gift Notes: ________________________________

______________________________

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 ___________________________

Acknowledging University Official signature ___________________________ date ___________________________

* Minimums effective 7/1/2021, and do not apply to School of Medicine

** This is not a binding estate commitment.

Rev. 11/2023