



# 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  
print donor name(s)  
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 \$100,000\* ☐  Named, Endowed Professorship:  
Minimum \$2 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