

Legacy Gift Intention

Thank you for including the students at Colorado Mesa University (CMU) in your generosity.

This form is solely to collect information that will assist the Colorado Mesa University Foundation in properly stewarding your intended gift. Its completion is optional.

I (We) _____ wish to advise the CMU Foundation of my (our) intent to make a gift through a provision in my (our) estate plan, trust, transfer upon death instrument, or other planned giving method.

I (We) understand this form does not create a binding obligation, and any details about my (our) intended gift will remain confidential. The CMU Foundation understands that the size of my (our) intended gift may change or be revoked entirely at our sole discretion, unless specifically agreed to as irrevocable. Any material provided by the CMU Foundation is not offered as legal or tax advice. You are urged to seek the advice of your tax advisor, attorney, and/or financial planner to make certain a contemplated gift fits well into your overall circumstances and planning.

- I (We) would like to share my (our) story to inspire others.
- I (We) prefer no public recognition.

Gift Information:

I (We) have provided an intended gift to the Colorado Mesa University Foundation as set forth in my (our):

- Will or Trust Charitable Gift Annuity Real Estate
- Charitable Trust Life Insurance Policy IRA/Retirement Plan
- The CMU Foundation is a transfer on death beneficiary of: _____
- Other Assets or interests: _____

The current estimated value of my (our) intended gift is \$ _____,
or ___% of _____.

- I (we) understand that by providing a current estimate of our intended gift, that my (our) estate(s) are not legally bound by this statement and that I (we) may add, subtract, or revoke our intended gift at any time, in my (our) sole discretion.

Gift Purpose:

- Please use my (our) intended gift at the discretion of the CMU Foundation.
- I (we) have included provisions for the designation and purpose of my (our) intended gift in my (our) will, trust, estate plan, or transfer on death designation, and have provide copies of the pertinent details to the CMU Foundation.
- I (we) have executed a gift agreement/memorandum of understanding with the CMU Foundation stating the designation and purpose of this intended gift.
Name of established fund: _____
CMU Foundation fund #: _____

Estate Contact Information:

Executor or trustee (if your intended gift is through a will, trust or payable on death designation)

Name: _____
Address: _____ City: _____ ST: __ ZIP: _____
Phone: _____ Email: _____

Administrating company (i.e., TIAA, Fidelity, etc., if your intended gift is through a retirement account or life insurance policy)

Name: _____
Address: _____ City: _____ ST: __ ZIP: _____
Phone: _____ Email: _____

Key contact you may want the CMU Foundation to know (family, attorney, CPA, advisor, etc.)

Name: _____ Relationship: _____
Address: _____ City: _____ ST: __ ZIP: _____
Phone: _____ Email: _____

Donor Signature: _____ Date: _____

Donor Signature: _____ Date: _____

The undersigned, being a duly authorized officer of the CMU Foundation, does hereby acknowledge receipt of this Legacy Gift Intention.

Printed Name: _____ Title: _____

Signature: _____ Date: _____

Additional information attached: Yes No

Please return this form, additional information, and direct all correspondence to:

Colorado Mesa University Foundation
1450 North 12th Street
Grand Junction, CO 81503-7686
email: foundation@coloradomesa.edu | phone: (970) 248-1902