



BEQUEST STATEMENT OF INTENT

Names

Address

City

State

Zip Code

Phone

E-mail

We are pleased to advise Niagara University that our current intention is to include Niagara University in our estate plan.

(Please check all that apply)

___ We have provided for a bequest of \$ _____ to Niagara University.

___ We have included provisions in our estate plan directing _____% of our estate to Niagara University. For valuation purposes, the approximate current value of this bequest provision is \$ _____.

___ We have made other provisions for the university in our estate plan as follows:

___ We have attached copies of beneficiary-designation forms in which Niagara is named as a direct beneficiary for: (please check one or more items below)

___ Sections of my will or living trust

___ Trust(s)

___ Retirement accounts

___ Paid on death annuities and/or savings bonds

___ Life insurance policy

___ Other _____

Estimated value: \$ _____

At this time, we have directed that the funding be used as follows:

We would like someone from Niagara to contact us with regard to the designation of our estate commitment. **Yes** **No**

We wish to remain anonymous regarding this intended gift. **Yes** **No**

Niagara University may publish our names as members of The Heritage Society, which recognizes those who remember Niagara through their estate planning. **Yes** **No**

We retain the right to change our minds as to our designation of Niagara University as a beneficiary, as to the purpose of our Niagara University bequest, and as to the portion and amount of our estate that will go to Niagara University.

_____ AGREED this _____ day of _____, 20____.

Signature

Date

Date of Birth

NIAGARA UNIVERSITY AGREED this _____ day of _____, 20_____.

BY:

Mr. Michael S. Jaszka
Vice President for Administration—Business Affairs

BY:

Ms. Mary E. Borgognoni
Senior Vice President for Operations & Finance

BY:

Rev. James J. Maher, C.M.
President

As with any decision involving your estate plan, we urge you to seek the advice of professional counsel when considering a gift to Niagara University.

**Please return to: Niagara University / Office of Planned Giving / PO Box 2008 /
Niagara University, NY 14109**