



BEQUEST STATEMENT OF INTENT

Name

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:

Dr. Derek M. Wesley
Vice President for Institutional Advancement

Date

BY:

Mr. Michael S. Jaszka
Chief Financial Officer

Date

BY:

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

Date

BY:

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

Date

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**