

Letter of Intent for a Planned Gift or Estate Bequest

As evidence of my/our desire to provide a legacy of support to University of the Pacific, I/we hereby inform Pacific's Office of Estate and Gift Planning, that I/we made a bequest to the University in my/our estate plan. I/We understand that this commitment is revocable and can be modified by me/us at any time.

JOE PACIFIC	01/01/1940	JANE PACIFIC	02/02/1940
Name	Date of Birth	Second Name (if joint)	Date of Birth
COP	1962	COP	1962
School (if applicable)	Class	School (if applicable)	Class
1234 OAK STREET		STOCKTON	CA 95211
Address	City	State	Zip Code
(209) 123-4567		JOE@GMAIL.COM	
Phone	Fax	E-mail	

I/we have left a legacy gift to University of the Pacific through my/our:

- Will
- Beneficiary Designation-Retirement Plan Assets
- Charitable Remainder Trust
- Living Trust
- Beneficiary Designation-Life Ins. Policy
- Other _____

I/We wish to inform University of the Pacific, for its long-term planning purposes only, that as of this date, the value of my/our gift is estimated at \$ EST/APPROX. VALUE \$10,000. (If your gift is a percentage of your estate, please indicate the approximate present value of the percentage.) For long-term record keeping purposes, it is helpful for us to have supporting documentation on file. If you are able, please include a copy of your estate planning documents or a letter from your attorney or financial advisor outlining your gift. For your records, our tax information is:

Legal Name: University of the Pacific
Address: 3601 Pacific Ave. Stockton, CA 95211
Federal Tax ID Number: 94-1156266

I/We understand that, by stating an amount, my/our estate is not legally bound by this statement, and I/we may choose to add, subtract, or revoke this bequest at any time, at my/our sole discretion. (Pacific's Office of Estate and Gift Planning kindly requests notification any time you make changes or adjustments to your gift).

Please designate my/our gift to the following school(s), program(s), scholarship(s), "in memory of" or "where the need is greatest":

STUDENT LIFE

As a legacy donor, University of the Pacific would like to recognize you as a member of its estate and gift planning donor recognition societies. Please indicate how you wish to be recognized for your gift:

- You may publish my/our name(s) on donor lists as motivation for others to leave a planned gift
- Please do not publish my/our name(s) on any donor lists

Donor Signature	Donor Signature	Date
Office of Estate & Gift Planning 3601 Pacific Avenue, Stockton, CA 95211 209.946.2501 FAX 209.946.2664 PacificPG@pacific.edu PacificPG.org		DEVELOPMENT OFFICER NAME DEVELOPMENT OFFICER TITLE UNIT/SCHOOL CUSTOMIZABLE