

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.

Name	Date of Birth	Second Name (if joint)	Date of Birth
School (if applicable)	Class	School (if applicable)	Class
Address	City	State	Zip Code
()	()		
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 \$_____. (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":

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Please do not publish my/our name(s) on any donor lists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
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Office of Estate & Gift Planning

3601 Pacific Avenue, Stockton, CA 95211
 209.946.2501 | FAX 209.946.2664
 PacificPG@pacific.edu | PacificPG.org