



# Planned Gift Intention Form

**Thank you for supporting the University of Hawai'i! We are deeply grateful for your generosity.**  
The information requested will help us to better understand and execute your wishes.

Name(s): \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Phone: ( \_\_\_\_\_ ) \_\_\_\_\_ Email: \_\_\_\_\_

## I/We have named the University of Hawai'i Foundation as a Beneficiary:

*Select all that apply*

- Will or Trust
- IRA (or Other Retirement Account)
- Life Insurance Policy
- Donor Advised Fund
- Other (please specify): \_\_\_\_\_

## My/Our Gift is a:

*Select one*

- Percentage ( \_\_\_\_%) of my/our estate approximately valued at \$\_\_\_\_\_.
- Stated amount of \$\_\_\_\_\_.

## My/Our Gift Designation:

- Priority Giving**, unrestricted support to the greatest need of the university.  
*Mahalo! Unrestricted general giving allows the university to address our community's most urgent needs.*
  - 100% to Priority Giving**
  - \_\_\_\_ % to **Priority Giving**, the balance as indicated in Specific Intent.
- Specific Intent**, to be used towards the following:
  - \_\_\_\_ % to **Specific Intent**, as indicated below.

Campus: \_\_\_\_\_ Program: \_\_\_\_\_

Other Instructions: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

*I/We understand with a specific intent gift, the requested use of my gift is subject to the eventual approval by the university.*



## Planned Gift Intention Form *cont.*

**I / We understand this form is not a legal or binding commitment.**

*All information will be held in strict confidence. UH Foundation understands that the size and profile of my/our future gift may ultimately be different than stated on this document.*

Donor's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Print Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Joint Donor's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Print Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

**Note:** *All gifts to the University of Hawai'i are accepted and administered by the University of Hawai'i Foundation, a private, institutionally related corporation designated as a 501(c)(3) organization by the Internal Revenue Service.*

### For questions or to return completed forms:

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Please visit our website for more information on bequest language: [uhfoundation.org/giftplanning](http://uhfoundation.org/giftplanning)