

Gift and Estate Planning Intention Letter

New\_\_\_\_ Revision/Update\_\_\_\_

As evidence of my/our desire to provide a legacy of support to UTMB, I/we have named the **Board of Regents of The University of Texas System for the benefit of The University of Texas Medical Branch at Galveston (“UTMB”)** as a beneficiary of my/our estate plans.

|  |  |
| --- | --- |
| Name(s): | |
| Address: | Phone: |
| City, State, Zip: | Email: |

**My/Our gift is designated for the following purpose:**

|  |
| --- |
|  |

**Estimated value of gift: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Type of Gift: (Check applicable box below)**

|  |  |  |  |
| --- | --- | --- | --- |
|  | Bequest (Will) |  | Life Insurance Beneficiary |
|  | Retirement Account Beneficiary |  | Charitable Gift Annuity |
|  | Financial Account Beneficiary |  | Other: |

**Heritage Council and Gift Recognition:**

|  |  |  |  |
| --- | --- | --- | --- |
|  | You may publish my name as a UTMB Heritage Council Member to encourage others to contribute. | | |
|  | Name(s) to be listed for recognition: | | |
|  | Please treat this gift as anonymous. |  | Please treat all gifts to UTMB as anonymous. |

**Reporting Succession Plan: (Contact information for individuals who should receive reports and/or event notifications after your lifetime) \***

|  |  |
| --- | --- |
| Name(s): | Relationship: |
| Address: | Phone: |
| City, State, Zip: | Email: |
| Notes: | |

\*continue on additional page if necessary

Signature Date

Signature Date

*As with any decision involving your assets, we urge you to seek the advice of your professional counsel*

*when considering a gift to The University of Texas Medical Branch at Galveston.*

*Donors retain the right to change or revoke revocable gift plans; however, we request that you notify UTMB should*

*your intent toward UTMB change or the value of your estate’s potential donation significantly increase or decrease.*

***THANK YOU FOR YOUR GENEROUS SUPPORT OF UTMB***

UTMB Development Office \* Gift and Estate Planning \* 301 University Boulevard \* Galveston, TX 77555-0148 \* 409.772.8767\* mylegacy.utmb.edu