



Gift and Estate Planning Intention Letter

I, \_\_\_\_\_, 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 will. This letter signifies my intention to keep in force in my will a donation of approximately \$ \_\_\_\_\_. Upon receipt of proceeds from Donor's estate, UTMB may apply the proceeds in Donors' names to create \_\_\_\_\_.

This letter entitles UTMB to count my gift intention towards UTMB's fundraising totals. Understanding that my gift intention is completely revocable, I will inform you should I change my intent toward UTMB or should the dollar value of my estate's potential donation significantly increase or decrease.

Name(s) \_\_\_\_\_ Age(s) \_\_\_\_\_
Address \_\_\_\_\_ Phone \_\_\_\_\_
City, State, Zip \_\_\_\_\_ Email \_\_\_\_\_

This Planned Gift is a:

- O Will Bequest O Charitable Lead Unitrust
O Retirement Beneficiary 401K/403b O Charitable Remainder Unitrust
O Life Insurance Beneficiary O Charitable Remainder Annuity Trust
O Charitable Gift Annuity O Financial Account Beneficiary
O Charitable Lead Annuity Trust

Approximate Gift Value \$ \_\_\_\_\_

Heritage Council and Gift Recognition

[ ] You may publish my name as a UTMB Heritage Council Member to encourage others to contribute.

Name to be listed for recognition: \_\_\_\_\_

[ ] Please treat this gift as anonymous.

[ ] Please treat all gifts to UTMB as anonymous.

Signature(s) \_\_\_\_\_ 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.