Bequests & Planned Giving—Statement of Intent

As an indication of support for Western University, I/we __________________________________________________________(name/s) am/are pleased to report that I/we have made the following commitment to Western’s future:

☐ My/Our will contains a provision for Western.
   The value of the gift is ______ % of the residue of my estate or $__________

☐ I/We have assigned Western as:
   ☐ owner and beneficiary of a life insurance policy
   ☐ beneficiary only of a life insurance policy
   ☐ beneficiary only of an ☐RRSP or ☐RRIF (check one)
   ☐ other _______________________________________________________________________

☐ The value of this policy is $_______________

Gift Information

The gift is: ☐ to be endowed ☐ expendable

☐ The use of this gift is UNRESTRICTED in support of the highest priority needs of the University.
☐ The use of this gift is RESTRICTED, to be used for the following Faculty, Department, Library or Program of the University __________________________
________________________________________________________________________________.

☐ I/We would like this gift to remain anonymous in perpetuity.

or

☐ To encourage others to support Western, I/we accept the University’s invitation to be recognized in donor listings. (Please provide recognition name below).

or

☐ I/We would like this gift to remain anonymous during my/our lifetime; however, when my/our gift is realized, I/we would like to be included in donor listings.

Please indicate below how your name(s) should appear for the purpose of recognition:

Name(s) _____________________________________________________________________________________________________________________

Please Sign and Date

Signature_________________________________________________   Signature_________________________________________________

Date___________________________________    Date___________________________________

Please note that this document is for information only and is not a legally binding commitment.