

# Planned/Estate Gift Declaration of Intent



I /We are pleased to share my/our intent to help provide for the future of UC Santa Barbara with a legacy gift.

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

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

Phone/Email: \_\_\_\_\_

Date(s) of Birth: \_\_\_\_\_

**I/We have named UC Santa Barbara as a beneficiary of a charitable gift in the following estate provisions:**

- |  |   |
|--|---|
| <input type="checkbox"/> Will/Living Trust | <input type="checkbox"/> Charitable Remainder Trust |
| <input type="checkbox"/> Retirement Plan   | <input type="checkbox"/> Life Insurance Policy      |
| <input type="checkbox"/> Other _____       |   |

Approximate amount of gift : \_\_\_\_\_ % of estate: \_\_\_\_\_

**I/We are directing our support to the following:**

- Department/Program/Fund \_\_\_\_\_
- Greatest Needs

**I/We have included a copy of the portion of my/our estate document naming the University as a beneficiary**

- Yes       No

I/We would like to be listed as members of UCSB's Legacy Circle. Please list me/us as:

\_\_\_\_\_

I/We do not want to be listed and wish to remain anonymous.