

Pepperdine University
Center for Estate and Gift Planning

ESTATE INTENTION FORM

My Will/Trust was signed on: _____ My Will/Trust provides that ____% shall be bequeathed to Pepperdine University through my estate. I estimate that the value of this provision in my estate plan would be approximately \$_____.

My Will/Trust provides that \$_____ shall be bequeathed to Pepperdine through my estate.

My Will/Trust provides that the following items of real or personal property shall be bequeathed to Pepperdine University through my estate:

_____ I estimate these items to be worth approximately \$_____.

My Will/Trust states that the bequest through my estate is unrestricted.

My Will/Trust states that the bequest through my estate should be used for the following specific purpose:

My intentions are listed below. Please follow the instructions below.

I understand that listing my gift may be an incentive to others and I am willing to be publicly acknowledged.

I prefer not to be listed or acknowledged publicly at this time.

I would like to remain anonymous and do not want to be listed or acknowledged publicly at this time.

I understand that this is not a legal or binding commitment upon my estate. Pepperdine University should understand that the size of my future gift might be significantly different from the amount estimated above. If for any reason in the future Pepperdine University is no longer included in my estate plan, I will notify you so that you can update your records and remove me from the Heritage Society.

Donor: _____

Phone#: _____

Date: _____

Respond to: Keith Hinkle, Associate Vice Chancellor Center for Estate and Gift Planning • Pepperdine University Malibu, CA 90263-4893 • Phone: (310) 506-4893 • Fax: (310) 506-4859 • E-mail to: keith.hinkle@pepperdine.edu