

Pepperdine University
Center for Estate and Gift Planning

RESPONSE/REQUEST FORM

INFORMATION REQUEST Please send me information on the following:

- Bequests Retained Life Estate
 Charitable Remainder Trusts

ADD TO MAILING LIST

- Yes, please mail to address below No thank you
 Yes, please email me as listed below

CONSULTATION REQUEST

- I would like to meet with you to review my estate plan. Please call to arrange it.
 I would like you to meet with my advisor and I to review my estate plan. Please call _____ at _____ to arrange it.
(Advisor's Name) (Telephone #)

ARE YOU CONSIDERING MAKING A GIFT TO PEPPERDINE UNIVERSITY?

- Yes Uncertain
 No

Additional Comments or Requests:

CALCULATION REQUEST Select the type of gift(s) you are interested in.

- Outright Deferred Charitable Gift Annuity
 Bequest (gift by will) Charitable Remainder Trust
 Charitable Gift Annuity

Select the type of asset(s) you are considering funding the gift with.

- Cash
 Securities
 Real estate
 Other (please specify) _____

Gift amount and cost basis:

Enter the dollar amount of the gift you are considering. \$ _____

Enter the cost basis of the asset (if other than cash) you are considering funding the gift with. \$ _____

Age(s) or bith date(s): Enter the age or birth date for each beneficiary.

Beneficiary 1: Age: _____ Birthdate: _____

Beneficiary 2: Age: _____ Birthdate: _____

YOUR INFORMATION

Name: _____

Address: _____

City: _____ State: _____

Zip: _____ E-mail address: _____

Home Number: _____ Work Number: _____

QUESTIONS OR COMMENTS

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