Loyola Marymount University

CONFIDENTIAL STATEMENT OF ESTATE PLAN & LEGACY GIFT (Bequest Intention Form Non-Binding)

I/We desire to provide for the future of Loyola Marymount University (LMU) through a provision in my/our estate plan. I/We understand that these plans are not legally binding and can be revoked or modified by me/us at any time. My/Our provision for LMU is through:

- ☐ Will or Living Trust
- ☐ Retirement Plan or IRA
- ☐ Remainder Interest in Real Estate
- ☐ Charitable Trust
- ☐ Life Insurance Policy
- ☐ Other _____

My/Our gift is:

- ☐ Unrestricted (LMU's Greatest Needs)
- ☐ Designated for _____

The **estimated current value** of my/our future gift is _____

LMU will receive this gift after: ☐ My life ☐ The later of two lives

May LMU publish your name(s), without dollar amounts, in Casassa Legacy Society member listings?

- ☐ I/We prefer to remain anonymous
- ☐ Please list my/our name as follows: _____

CONTACT INFORMATION

Name	_____	**Name**	_____
Phone	_____ **DOB** _____	**Phone**	_____ **DOB** _____
Email	_____	**Email**	_____
Address	_____		
Signature	_____	**Signature**	_____
Date	_____	**Date**	_____

If you provide a copy of your estate documents to the Office of Gift Planning at LMU, you will help LMU ensure your wishes will be efficiently directed as you intend (e.g., will or trust excerpt, beneficiary designation form). Please attach additional sheets if needed.

Return to:
LMU Office of Gift Planning
1 LMU Drive, Suite 2800
Los Angeles, CA 90045-2659
310-338-1862

Bonnie Harris Hayden, Esq.
Executive Director of Development, Gift Planning
bonnie.hayden@lmu.edu
310-338-2920

LMU Tax ID: 95-1643334 **Legal Name:** Loyola Marymount University

Thank you for your generosity and dedication to LMU. Your legacy is our future!

Bequest Designation – Suggested Language for your Will/Trust - Non-Binding

Gift of a specific dollar amount: I give, devise and bequeath to LOYOLA MARYMOUNT UNIVERSITY (LMU), EIN 95-1643334, ATTN: Office of Gift Planning, 1 LMU Drive, Suite 2800, Los Angeles, CA 90045-2659, [$DOLLAR AMOUNT] to be used in accordance with my most recent signed Bequest Intention Form held at LMU.

Gift of a percentage of your estate: I give, devise and bequeath to LOYOLA MARYMOUNT UNIVERSITY (LMU), EIN 95-1643334, ATTN: Office of Gift Planning, 1 LMU Drive, Suite 2800, Los Angeles, CA 90045-2659, [PERCENTAGE %] of the rest, residue and remainder of my estate to be used in accordance with my most recent signed Bequest Intention Form held at LMU.

Gift of your entire estate: I give, devise and bequeath to LOYOLA MARYMOUNT UNIVERSITY (LMU), EIN 95-1643334, ATTN: Office of Gift Planning, 1 LMU Drive, Suite 2800, Los Angeles, CA 90045-2659, all of the rest, residue and remainder of my estate, to be used in accordance with my most recent signed Bequest Intention Form held at LMU.

Gift of real property (e.g., vacation home, commercial property): I give, devise and bequeath to LOYOLA MARYMOUNT UNIVERSITY (LMU), EIN 95-1643334, ATTN: Office of Gift Planning, 1 LMU Drive, Suite 2800, Los Angeles, CA 90045-2659, all of the right, title and interest in and to the real property located at [PROPERTY ADDRESS] to be used in accordance with my most recent signed Bequest Intention Form held at LMU.

Gift of tangible personal property (e.g., artwork, jewelry, collectibles): I give, devise and bequeath to LOYOLA MARYMOUNT UNIVERSITY (LMU), EIN 95-1643334, ATTN: Office of Gift Planning, 1 LMU Drive, Suite 2800, Los Angeles, CA 90045-2659, [DESCRIPTION OF ITEM] to be used in accordance with my most recent signed Bequest Intention Form held at LMU.

Beneficiary Designation – IRA/Retirement Plans and IRA Charitable Rollovers (QCD)

IRA Beneficiary Designations: To support specific schools, programs or initiatives, with your IRA legacy gift, please complete this Bequest Intention Form AND your IRA Plan Sponsor's beneficiary change form.

***IRA Charitable Rollovers (Qualified Charitable Distributions or QCDs*)**: After you direct your IRA Sponsor to send your QCD to LMU, please send the Office of Gift Planning an email message to let us know to which school, program or initiative we should direct your gift.

Other Types of Gifts

Gifts of Appreciated Assets: With some conditions, LMU is delighted to accept gifts of publicly-traded securities, paid-up life insurance policies, commercial and residential real estate, limited partnership and limited liability company interests, closely-held C corp stock, oil, water and mineral rights, intellectual property, and other complex assets. Contact Gift Planning at giftplanning@lmu.edu for more information.

Gifts That Pay Income: The Office of Gift Planning also works with donors tand their trusted advisors to craft planned gifts that pay income to donors, such as charitable gift annuities and charitable remainder annuity trusts, and charitable remainder trusts, Contact Gift Planning at giftplanning@lmu.edu for more information.

The Gift Planning Office works with every college and program at LMU. Allow us to work with you to establish your legacy here at LMU.

LMU Tax ID: 95-1643334 Legal Name: Loyola Marymount University

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