



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

- LMU Loyola Law School
 Designated for _____

The **estimated current value** of our future gift is \$ _____

I understand that my estate is not legally bound by this statement and that I may choose to increase, decrease, or revoke this bequest at any time, at my sole discretion.

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?

- We prefer to remain anonymous
 Please list our names as follows: _____

CONTACT INFORMATION

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

A copy of your documentation relating to your LMU gift will help LMU ensure your objectives can be met (e.g., will or trust excerpt, beneficiary designation form). Also please attach additional sheets if needed to further describe your gift and wishes.

Return to:

LMU Office of Gift Planning
1 LMU Drive, Suite 2800
Los Angeles, CA 90045-2659
310.338.7526
giftplanning@lmu.edu

LMU Tax ID: 95-1643334

Legal Name: Loyola Marymount University

Thank you for your generosity and dedication to Loyola Law School. Your legacy is our future!

The Gift Planning Office is available to help you and your advisors coordinate your Estate Plans with LLS/LMU, to insure we properly carry out your wishes. Please call us any time.

Suggested Language

Bequest Designation – Will/Trust

"A bequest to benefit Loyola Law School, Loyola Marymount University, EIN 95-1643334, 1 LMU Drive, Suite 2800, Attn: Office of Gift Planning, Los Angeles, CA 90045-2659, in accordance with my most recent signed Bequest Intention Form held at LMU."

Beneficiary Designation – Retirement Plans

Loyola Marymount University/ LLS
EIN 95-1643334

1 LMU Drive, Suite 2800
Attn: Office of Gift Planning
Los Angeles, CA 90045-2659

How to Maintain Flexibility with LMU Bequests

If you wish to create a legacy through your estate plans to benefit Loyola Law School, Loyola Marymount University, the attached Statement of Bequest Intention describes how LLS/LMU should direct any assets that we may receive from your estate. Should you change your mind about the exact designation or usage of your gift, we can update this form. This prevents additional legal fees to amend your will or trust, to update your legacy at LLS.

Through the entire gift planning process, we will work with you to ensure your wishes can be fulfilled. You may update or revoke your Bequest Intention at any time or change your legal documents with regards to LLS/LMU. Your Bequest Intention is not binding on your estate. The benefit is that when LLS/LMU receives assets from your estate, we will honor your wishes in accordance with your estate documents, Bequest Intention or informal Letter of Instruction.

How to Use Beneficiary Designations & IRA Charitable Rollovers

Please direct your Beneficiary Designations and IRA Charitable Rollovers to "Loyola Marymount University/LLS." To support specific areas, please complete a Bequest Intention form or a Letter of Instruction. An email will suffice to direct IRA Charitable Rollovers to specific areas.

Why Sharing Your Beneficiary Designation **Protects Your Legacy**

The Bequest Intention Form connects your estate plan documents, to your specific wishes at LLS/LMU. Financial institutions, insurance companies, and donor advised funds may not be obligated to inform beneficiaries of an untimely passing, which may cause unnecessary delay. In addition, the specific designations may be challenging to administer many years in the future, without guidance from the Gift Planning Office or a Loyola Law School Development Officer.

The Gift Planning Office works with every college and program at LMU. Allow us to work with you, to better serve your legacy now, and many years in the future.

Your Legacy is Our Future. Go Lions!