



Marshall B. KETCHUM UNIVERSITY

Office of University Advancement

My Estate Includes Marshall B. Ketchum University

- Southern California College of Optometry School of Physician Assistant Studies College of Pharmacy

The information in this form is considered highly confidential by the Office of University Advancement and protected by University policy. The information you provide will be used only to assure your gift is directed towards your desired purpose and to provide recognition of your gift if you choose.

Name(s) Recognition Name (if different)

Address City State ZIP

Phone Email

Year of Graduation (if applicable) Birth Date(s)

My planned gift includes:

- | | |
|--|--|
| <input type="checkbox"/> Bequest from will or trust | <input type="checkbox"/> Beneficiary of IRA, life insurance or other retirement plan |
| <input type="checkbox"/> Charitable Gift Annuity | <input type="checkbox"/> Charitable Remainder Trust |
| <input type="checkbox"/> Other (please describe) _____ | <input type="checkbox"/> Real Estate |

The *estimated* value of this gift **as of today's date** is \$ _____

- I would like to be listed as a member of the MBKU Visionaries Society (the campus recognition society for donors who make estate gifts). Please include my/our name(s) without disclosure of amount, in the MBKU Visionaries Society and other campus recognition as shown above in "recognition name."
- I would like this gift to remain anonymous and confidential. Please do not include me in the Visionaries Society mailings or in other campus recognition now or in the future.

This statement is an expression of my current plans and may be revoked. I understand that this statement is not legally binding on my estate and that this information is solely for University use to facilitate proper application of my gift at the time it arrives.

Date

Date

- I am interested in including MBKU in my Estate Plans, please contact me.

Please contact the Office of University Advancement by emailing plannedgiving@ketchum.edu or by phone **714.463.7551** for information or assistance. This form may be returned to the Office of University Advancement.