



## Planned Gift Intention Form

*Thank you for your generosity and commitment to support Kimball Union Academy's mission to create a deep sense of belonging for all members of our community and promote excellence inside and outside of the classroom. Legacy gifts support important and strategic areas at KUA, including student scholarships, exceptional faculty, and educational programs that keep our campus vibrant. We appreciate your willingness to share your intention.*

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I am pleased to give Kimball Union Academy an estimate of my planned gift intention to help with its strategic planning for the future.

I have included KUA as the beneficiary of my (*check all that apply*):

- Will                                       Revocable Trust                       Irrevocable Trust  
 Life Insurance Policy                       Retirement Account                       Other \_\_\_\_\_

My planned gift intention is:

- Contingent                                       Residual  
 A specific amount of \$ \_\_\_\_\_.  
 A percentage gift of \_\_\_\_\_%. Currently, this may result in a gift of \$ \_\_\_\_\_.

*All amounts provided will be kept confidential.*

I have directed that my planned gift to KUA is to be used for:

- Unrestricted use     Scholarship     Other \_\_\_\_\_  
 I would like to be recognized for my Gift as: \_\_\_\_\_  
 I would prefer to remain anonymous.

**I understand that providing the information above does not represent a binding obligation on my part or on the part of my heirs.**

Name: \_\_\_\_\_ Birthdate: \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_