



STATEMENT OF INTENT *(for a Future Gift)*

As evidence of my/our desire to provide a legacy of support to the University of South Carolina Upstate, I/we hereby inform the University of South Carolina Upstate Foundation that I/we have made provision for a gift to the University in my/our estate plan. I/we understand that this commitment is revocable and can be modified by me/us at any time.

Name _____ Birthdate _____

Name _____ Birthdate _____

Address _____

City _____ State _____ ZIP _____

Email _____ Phone (____) _____ Cell Home

DESCRIPTION OF GIFT (TYPE/VALUE)

- Bequest through will/trust:
 - percentage of estate % _____ specific amount \$ _____
 - other *(please specify)* _____
- Charitable Trust *(select one)* unitrust annuity trust revocable trust lead trust
- Charitable Gift Annuity *(select one)* immediate deferred
- IRA or Retirement Plan *(please describe)* _____
- Other *(please describe)* _____

I/We have provided will provide to the USC Upstate Foundation a copy of the portion of my/our will(s) or other instrument that pertains to the University of South Carolina Upstate.

With the understanding that values are subject to change, at this time I/we estimate the value of my/our gift to be approximately \$_____ in today's dollars. I/we understand that, by stating an amount, my/our estate is not legally bound by this statement and I/we may choose to add, subtract, or revoke this bequest at any time, at my/our sole discretion.

PURPOSE OF FUTURE GIFT

- This gift is to be unrestricted and may be used where the need is greatest at USC Upstate.
- I/We wish to specify that this gift be used for (Briefly describe the school, college, program, or fund you would like your gift to benefit. If multiple areas, please provide percentages or specific amounts):

The Legacy Society recognizes the special group of USC Upstate alumni and friends who have invested in the University's future through a planned gift. Membership in this gift club expresses your belief in USC Upstate and demonstrates your commitment to improving the future through higher education.

- ACCEPT membership in the Legacy Society.
 - PERMISSION to publish our names in the donor honor roll. I/we wish my/our name(s) to appear as follows: _____
 - DO NOT PUBLISH my/our names on the donor honor roll.
- DECLINE membership in the Legacy Society.
- This gift is ANONYMOUS.

DONOR SIGNATURE _____ DATE _____

DONOR SIGNATURE _____ DATE _____

The USC Upstate Foundation does not provide tax or legal advice. Prospective donors should consult with their legal and financial advisors. All charitable contributions are subject to the gift policies and fees in effect when the gift is realized. If you need assistance with your gift, or to learn more about donor rights and privacy; gift, endowment, and fee policies; and frequently asked questions, please contact the Office of University Advancement.

THANK YOU FOR YOUR SUPPORT OF USC UPSTATE!
800 University Way, Spartanburg, SC 29303
864-503-5234 | visit: uscupstate.edu/advancement | email: giving@uscupstate.edu