

## Testamentary Gift Intention Form

Name \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

Significant other \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

Address \_\_\_\_\_

I/We have made/intend to make provisions for the Earthquake Engineering Research Institute (EERI) in my/our estate plan in the following ways: (check all that apply)

- Will
- Living Trust
- Donor Advised Fund
- Charitable Remainder Trust
- Charitable Lead Trust
- Retirement Plan
- Life Insurance Designation
- Other (please describe): \_\_\_\_\_
- I / we have yet to determine the exact nature of my/our gift in our will or estate plan but intend to do so.

[OPTIONAL] The estimated value of my legacy gift will be: \_\_\_\_\_

My/Our intention is that EERI use this future gift for the following purpose:

- Learning From Earthquakes Endowment Fund
- Unrestricted Gift

\*if neither option is selected the gift will be treated as unrestricted

Please use the following names for recognition:

- 
- I/We wish to remain anonymous

Your Professional Advisor / Attorney

Name \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

#### Additional Terms

This statement of intention and expectation shall not constitute a legal obligation and shall not be legally binding in any way on me/us or my/our estate. While I/we consider that I/we have an obligation to make this gift, I/we reserve the right to adjust or to cancel it in the event of unforeseen circumstances.

The LFE Endowment Fund is a board designated endowment. While the Board of Directors is legally permitted to spend principal, the LFE Endowment Fund is intended to provide a sustainable level of income to support the Learning from Earthquakes Program of the Institute while maintaining its purchasing power in future years. The EERI Board of Directors has the authority to define what activities and initiatives constitute the LFE program and determine the investing and spending policies applicable to the Fund. In the unlikely event that the LFE program no longer exists or it becomes impossible or impractical to carry out the above purposes, the assets of the LFE Endowment Fund will be used to further EERI's mission of reducing earthquake risk.

Signature \_\_\_\_\_

Date \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_