



Confidential Gift Plan Information

Indication of Planned Gift

I have made provisions for a gift to the Texas A&M Foundation in my estate plan:

- | | |
|---|--------------------------------------|
| <input type="checkbox"/> Will | Estimated Current Value:
\$ _____ |
| <input type="checkbox"/> Beneficiary of life insurance policy | \$ _____ |
| <input type="checkbox"/> Beneficiary of IRA or other deferred account | \$ _____ |
| <input type="checkbox"/> Beneficiary of a trust: | |
| 1. Revocable beneficiary | \$ _____ |
| 2. Irrevocable beneficiary | \$ _____ |
| <input type="checkbox"/> Gift Annuity | \$ _____ |
| <input type="checkbox"/> Other (please describe) | \$ _____ |

Please assist the Texas A&M Foundation and Texas A&M University by providing information about your intended future gift. Please attach a copy of your will(s) or trust(s), or copies of those pages describing the gift, along with the first and last pages of the document. For insurance gifts, please provide a copy of the policy and beneficiary form. For gifts from an IRA or other deferred account, please provide a copy of the beneficiary form. All gifts should be directed to the Texas A&M Foundation, College Station, Texas. The Foundation was founded in 1953 to accept and manage all private gifts for Texas A&M University.

A&M Legacy Society

Many of us desire to pass on the opportunities Texas A&M has given us. The A&M Legacy Society recognizes those who answer that call. By using innovative gifting plans to ensure future gifts, Heritage Members of the A&M Legacy Society are displaying their belief in the enduring value of Texas A&M. By providing information on your planned gift, you become an honoree of the A&M Legacy Society as a Heritage member. The foundation will keep the details of your gift confidential, and you are welcome to decline public recognition. However, public recognition is encouraged so you may be an encouragement and inspiration to others.

- You may publish my name as a Heritage Member of the A&M Legacy Society.
My name should be listed as follows: _____
- Please do not publish my name as an honoree of the A&M Legacy Society.

Name(s): _____

Address: _____ City, State, Zip: _____

Telephone: _____ Email: _____

Date(s) of birth: _____

Signature(s): _____

Date: _____