

CONFIDENTIAL LETTER OF INTENT

My Intention

I am pleased to inform you that I have included McGill University as a beneficiary of my estate plans as follows:

- | | |
|---|---|
| <input type="checkbox"/> Bequest (Will) | <input type="checkbox"/> Life Insurance Policy |
| <input type="checkbox"/> Charitable Gift Annuity | <input type="checkbox"/> Charitable Remainder Trust |
| <input type="checkbox"/> Retirement Plan (RRSP/RRIF/IRA/401K) | <input type="checkbox"/> Other Assets _____ |

I estimate the current value of this gift to be \$ _____ (*confidential*)

I confirm that my bequest or the proceeds from another type of planned gift is to be directed to:

- McGill's greatest needs
- Designation _____

I understand that this declaration of intent will remain strictly confidential and is not legally binding nor does it replace a Will or life insurance policy or charitable gift annuity contract. This signifies my commitment to the continued viability and vitality of McGill University.

Name: (*please print*) _____ Birth date: _____

(If Joint) Spouse Name: _____ Birth date: _____

Address: _____

City: _____ Province/State: _____ Postal/Zip Code: _____

Phone Number: () _____ Email: _____

Signature: _____

(Date)

In Recognition

All donors of planned gifts qualify for inclusion and recognition in the **McGill 1821 Society/Macdonald Legacy Society**, which honours those who have remembered McGill University in their estate plans. Through the **McGill 1821 Society/Macdonald Legacy Society** you will be invited to events and kept up to date on key developments at the University.

Please check one:

- Yes, please include me in the **McGill 1821 Society/Macdonald Legacy Society**.
My/our name(s) should appear as follows: _____
- Yes, please include me/us in the **McGill 1821 Society/Macdonald Legacy Society**, but do not publicly recognize me.
- No, please do not include me/us in the **McGill 1821 Society/Macdonald Legacy Society**.

Please return to:

