

HOW TO GIVE

A GIFT TO THE UNIVERSITY OF TEXAS AT SAN ANTONIO

A practical way to make a planned gift to The University of Texas at San Antonio is to include UTSA in your will or revocable trust, or as a beneficiary of your retirement plan or life insurance. If you have already made a provision to include UTSA in your financial planning, please notify us by completing and returning this document. By documenting your bequest intention, UTSA will have an opportunity to recognize your generous support in your lifetime.

Information provided to signify your bequest intention to UTSA will remain completely confidential unless you authorize UTSA to publicize your gift. UTSA understands that all bequest provisions are revocable, and any intentions stated here are not binding on you or your estate.

I have made revocable gift commitments for The University of Texas at San Antonio as follows: *(check all that apply)*

- | | |
|--|-----------------------------|
| ☐ Bequest | Approximate value: \$ _____ |
| ☐ Life Insurance Policy | Approximate value: \$ _____ |
| ☐ IRA or other retirement plan | Approximate value: \$ _____ |
| ☐ Other asset | Approximate value: \$ _____ |

Recognition: *(select one)*

- ☐ I/we accept membership into the Sombrilla Society (recognition society for donors who have included The University of Texas at San Antonio in their estate plan). Please publish my/our name(s) among your lists of Sombrilla Society members.

Please clearly print the text as it should appear: _____

- ☐ Please do not list my/our name(s) publicly.

Signature

Signature

Date

Date

Name *(please print)*

Name *(please print)*

Contact information—representative of my estate:

Name

Role

Telephone

Email

- ☐ I have attached documentation from my will, retirement plan, life insurance policy, or trust.

If your gift is for a percentage of your estate, rather than a fixed amount, UTSA will be happy to use your good faith estimate of the current value based on this percentage. While not required, you may wish to include a copy of the relevant portion of related documents.