

AUGUSTANA UNIVERSITY

HERITAGE SOCIETY

RETIREMENT FUNDS

PRIMARY NAME _____

PRIMARY DATE OF BIRTH _____

ADDRESS _____

CELL PHONE _____ HOME PHONE _____

EMAIL _____

SECONDARY NAME _____

SECONDARY DATE OF BIRTH _____

I have chosen to invest in the future of Augustana through the following legacy gift:

- Individual Retirement Arrangement (IRA)
- Pension Plan (Defined Benefit or Money Purchase)
- Profit Sharing [including 401(k) feature; 403(b); 457]
- Other: _____

Percent designated for Augustana: _____ %

The approximate current value of this gift is \$ _____

Company name and contact information: _____

I designate my gift for:

Unrestricted Support _____ %

Scholarships (please provide details below) _____ %

General Endowment _____ %

Other (please provide details below) _____ %

Additional Notes & Instructions:

Legal Advisor Information:

ATTORNEY _____

ADDRESS _____

PHONE _____

EMAIL _____

EXECUTOR _____

It is my intention to make a charitable gift as described above. This document is a record of my current intentions so the University can keep an accurate accounting of anticipated gifts.

Primary Signature

Date

Secondary Signature

Augustana Representative

If you do not want to be recognized publicly:

Augustana Heritage Society members are listed at augiegiving.org. No details related to your gift are published. If at any point in the future you wish to remove your name from the Augustana Heritage Society listing, we will do that upon your request.

Please do not include my name on the Augustana Heritage Society honor roll at augiegiving.org.