

# AUGUSTANA UNIVERSITY

## HERITAGE SOCIETY

### LIFE INSURANCE

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:**

- Existing life insurance policy — paid up in full
- Existing life insurance policy — future premiums to be paid
- New life insurance policy
- Partial beneficiary designation ( \_\_\_\_\_ %)

Face value of this policy is \$ \_\_\_\_\_ Cash surrender value of this policy is \$ \_\_\_\_\_

**My future intentions for premium payments are:**

- Paid-up policy – no premiums are due
- Paid directly to the insurance company
- Paid to Augustana to cover premiums – continue lifetime payments
- Paid to Augustana to cover premiums – limited pay basis

If limited pay, I anticipate paying \_\_\_\_\_ years of premiums.  
Augustana will surrender policy and withdraw the cash value if donor discontinues premium payments.

**I designate my gift for:**

Unrestricted Support	_____ %
Scholarships (please provide details on back)	_____ %
General Endowment	_____ %
Other (please provide details on back)	_____ %

**Insurance Company Information**

INSURANCE COMPANY \_\_\_\_\_

ADDRESS \_\_\_\_\_

\_\_\_\_\_

PHONE \_\_\_\_\_

EMAIL \_\_\_\_\_

POLICY OR CONTRACT NUMBER \_\_\_\_\_

**Additional Notes & Instructions:**

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](http://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](http://augiegiving.org).