

My estate plans with SFU



ADVANCEMENT & ALUMNI
ENGAGEMENT

Your commitment to Simon Fraser University is sincerely valued. We want to make sure our information regarding your estate plans is up-to-date and your preferences for recognition are honoured.

Please fill in the enclosed form and return it at your earliest convenience to the address provided. Your information will be kept private and confidential.

Name:

Address:

Birth date(s):

Phone: Email:

I/we have included a future legacy gift for SFU through:

- | | |
|--|---|
| <input type="checkbox"/> Will – residual bequest | <input type="checkbox"/> RRSP/RRIF/TFSA |
| <input type="checkbox"/> Will – specific bequest | <input type="checkbox"/> Gift annuity |
| <input type="checkbox"/> Life insurance | <input type="checkbox"/> Trust/Charitable Remainder Trust |
| <input type="checkbox"/> Other | |

We want to ensure we honour and respect your recognition preferences, whether you choose to remain anonymous or allow us to publicly celebrate your generosity.

How would you prefer to be recognized?

- I/we would like to be acknowledged as a generous planned gift donor to SFU
- I/we wish to defer recognition until the gift is received
- I/we wish to remain anonymous

My name should appear as follows (if your gift is a joint gift, please include both names to be recognized):

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Please turn over to share more information about your gift...

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It's helpful for us to know the details of your estate plans, so we can ensure your wishes are carried out as you intend. Please share additional information in the space below.

- What inspired you to make your gift?
- Would you like your gift to be used for a specific purpose?
- What are you hoping your gift will accomplish?
- What is the approximate value of your gift?

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We understand that your plans may change and encourage you to get in touch with our Director of Gift and Estate Planning, Rory Green. Please call (604-306-1999) or email (rory_green@sfu.ca) anytime. Thank you for your incredible generosity to SFU!

Return the completed form to:

Rory Green
Pronouns: She, Hers
Director, Gift & Estate Planning
2118 Strand Hall
8888 University Drive
Burnaby, BC V5A 1S6