

My estate plans with SFU

SFU Future Legacy Circle



SIMON FRASER
UNIVERSITY
ENGAGING THE WORLD

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:

- Will – residual bequest
- Will – specific bequest
- Life insurance
- Other
- RRSP/RRIF/TFSA
- Gift annuity
- Trust/Charitable Remainder Trust

We want to recognize and celebrate your outstanding commitment to the university through our **SFU Future Legacy Circle**. As a member of the Circle, you can attend exclusive events, connect with student ambassadors, experience a private tour at any one of our campuses or meet with university leadership.

How would you prefer to be recognized?

- I/we would like to be acknowledged as a member of the Future Legacy Circle
- 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, Cary Gaymond. Please call (778.782.7308) or email (cary_gaymond@sfu.ca) anytime. Thank you for your incredible generosity to SFU!

Return the completed form to:

Ms. Cary Gaymond, CFRE
Senior Director, Gift & Estate Planning
2118 Strand Hall
8888 University Drive
Burnaby, BC V5A 1S6