

## **MY ESTATE PLANS WITH SFU**

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 this 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	
RRSP/RRIF/TFSA	

I estimate the current value of my gift to be (\$):

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):

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?
- WOULD YOU LIKE TO DEDICATE YOUR GIFT TO SOMEONE?

We understand that your plans may change and encourage you to get in touch with our Senior Director, Principal and Planned Gifts, 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 Senior Director, Principal and Planned Gifts, Gift & Estate Planning 2118 Strand Hall 8888 University Drive Burnaby, BC V5A 1S6