

MERCYHURST UNIVERSITY

ESTATE INTENTION FORM

Thank you for your commitment to Mercyhurst University.

Your generosity will ensure future generations of students will have the same first-class educational experiences and opportunities that benefit current students.

Please complete the following information to notify Mercyhurst University of your estate intention. The Office of Advancement will use this form to record your gift and to establish and verify the ultimate purpose for your funds. To ensure that your gift intentions are fully honored, please return this form along with a copy of the relevant section of your will or other estate documents which reference Mercyhurst.

This document is non-binding and will be used only for recordkeeping purposes. All information contained in this document will remain confidential.

Name: _____ Class Year: _____

Birthdate: _____

I. RECOGNITION

Your name will be listed in written publications as a member of the O'Neil Society, the university's planned giving society. No further information about your bequest (including amounts) will be disclosed.

Mercyhurst has my permission to list my name. I prefer to remain anonymous.

Include my spouse as a member of the O'Neil Society: _____
(List spouse's name as you want it to appear)

II. TYPE OF GIFT

Mercyhurst University is named as a beneficiary in my:

(Please estimate the current value of each gift.)

Will: \$ _____ or _____ % of my estate, gift valued at \$ _____

Insurance Plan: \$ _____ Retirement Plan/IRA: \$ _____

Life-Income Plan: \$ _____ Other Asset: \$ _____

I prefer not to disclose any information regarding value.

This gift will be distributed to Mercyhurst University upon:

My death Other: _____

(If not until a survivor's death, please provide his/her name and birthdate)

III. DESIGNATION OF MY ESTATE GIFT

Please use my gift to Mercyhurst University in the following way:

Please use my gift at the university's discretion.

Signature: _____ Date: _____

Please notify the Office of Advancement if you make any changes to your estate intentions so we can ensure that your wishes are fully honored.

Please return this form to:



501 East 38th Street · Erie, PA 16546

Questions? Call: 814-824-2545 or Email: alumni@mercyhurst.edu.