



Santa Clara University
Office of Planned Giving
500 El Camino Real
Santa Clara, CA 95053-1400

Thomas I. Bergin Legacy Society NOTICE OF ENROLLMENT AND INTENTION

This document is to record your intention to leave a gift to SCU through your estate plan. This gift is not binding but it allows us to thank you today, helps the University plan its future, and encourages other alumni and friends to make a gift that will transform the experience of future generations of students. Your gift may also be counted towards the Campaign for Santa Clara that helps advance our distinctive Jesuit education. More than 1,000 individuals have included Santa Clara University in their will or trust, or as a beneficiary of their retirement plan or life insurance policy. These alumni and friends are recognized as members of the Thomas I. Bergin Legacy Society. Thank you for your generosity to SCU.

Please acknowledge my/our name(s) as follows:

Print name(s): _____	Email: _____
Signature: _____	Date: _____
Signature: _____	Date: _____
Street Address: _____	
City/State/ZIP: _____	

1. I/we have included SCU as a beneficiary of my/our: (check all that apply)

- ☐ Will/Living Trust ☐ Retirement Plan ☐ Charitable Remainder Trust
☐ Charitable Gift Annuity ☐ Life Insurance Policy
☐ Other _____

2. With a gift value of:

\$ _____ (Present value of the gift, an estimate will suffice)

This value represents:

- ☐ a specific gift listed in my/our estate plan
☐ _____ % of my/our estate plan ☐ _____ % of the remainder of my/our estate plan
☐ _____ % of my/our retirement plan ☐ _____ % of my/our Life Insurance Policy

Your Intention Today Helps Santa Clara University Plan Its Future

3. ☐ My gift to SCU depends upon a contingency, such as a prior death of a partner or family member.

☐ SCU will receive our gift after the lifetime of the surviving spouse/partner.

4. **Is your planned gift restricted to a specific SCU school, program, or scholarship type?**

☐ Yes ☐ No

If Yes, Please specify: _____

5. ☐ **I would like my gift to create an endowed fund.** An endowed fund requires a gift agreement.

Sample language for designating a bequest to Santa Clara University

I hereby give to the PRESIDENT AND BOARD OF TRUSTEES OF SANTA CLARA COLLEGE, (hereinafter referred to as “the Board” or “Santa Clara University”), an educational institution located in California, the following:

Property, described as _____ OR

The sum of \$ _____ OR

A dollar amount equal to _____ percent of my adjusted gross estate for federal estate tax purposes
OR

A dollar amount equal to _____ percent of the remainder of my adjusted gross estate for federal estate tax purposes.

Tax ID number: 94-1156617

Thank You for Your Support of Santa Clara University

For questions or further information, please contact:

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