



LEGACY GIFTS AT AGA KHAN UNIVERSITY

THE LEGACY SOCIETY

INFORMATION ON YOUR LEGACY GIFT

I/We have named the Aga Khan Foundation USA/Aga Khan University in my/our estate plans as follows:

Will/Living Trust for: a specific amount a percentage: _____%

ESTIMATED VALUE: \$_____

Retirement Plan for: a specific amount a percentage: _____%

ESTIMATED VALUE: \$_____

Charitable Remainder Trust

ESTIMATED VALUE: \$_____

Donor Advised Fund

ESTIMATED VALUE: \$ _____

Life Insurance Policy

ESTIMATED VALUE: \$ _____

Other: please describe: _____

ESTIMATED VALUE: \$ _____

Further information on my/our legacy gift [such as the name and contact information of the executor, law firm, life insurance company, or retirement plan administrator]:

My/our legacy gift is:

Unrestricted Designated specifically for: _____

Not yet designated: please call or e-mail me to discuss the designation

HOW AKU SHOULD ACKNOWLEDGE YOUR GIFT

Your legacy gift entitles you to membership in our Legacy Society and to having your name listed with those of others who have created a similar gift for AKU.

Please list my name in the Society's publications [without the details of the gift]

I wish to be listed as: _____

Please include my spouse as a member of the Legacy Society

Spouse name: _____

I would like to be an anonymous member: please do not list me in the Society's publications

By: _____ Date: _____

By: _____ Date: _____

Name (please print): _____

Address: _____

Telephone number: _____

E-mail address: _____

This form is nonbinding: we understand that legacy gifts are alterable and that your plans may change. The information in this form will be kept in the strictest of confidence.

Should you have any questions at all on legacy gifts, please call or e-mail Robert Sweet, Senior Philanthropic Advisor, Principal and Planned Gifts. Robert's telephone number is 1.203.273.4080, his e-mail address robert.sweet@aku.edu.

P L E A S E R E T U R N T H I S F O R M T O
R O B E R T . S W E E T @ A K U . E D U