



THE AGA KHAN UNIVERSITY

GIFT PLANNING AT AGA KHAN UNIVERSITY

# THE GIFT PLANNING SOCIETY

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## INFORMATION ON YOUR FUTURE 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 future gift [such as the name and contact information of the executor, law firm, life insurance company, or retirement plan administrator]:

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My/our 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 future gift entitles you to become a member of our gift planning society and have your name listed with those of others who have created a similar gift for AKU.

Please include my spouse as a member of the society

Spouse name: \_\_\_\_\_

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

I/We wish to be listed as: \_\_\_\_\_

I/We would like to be anonymous members: please do not list us 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 bequest provisions are revocable and that your estate plans may change. The information in this form will be kept in the strictest of confidence.*

*Should you have any questions at all on planned 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.*

THANK YOU FOR SUPPORTING THE CRITICAL  
WORK OF AGA KHAN UNIVERSITY

PLEASE RETURN THIS FORM TO  
ROBERT.SWEET@AKU.EDU