

McCombs School of Business

Estate Intention Letter

Thank you for your interest in taking part in the McCombs School of Business Legacy Challenge! Your gift will leave a lasting legacy that benefits countless future students and makes an immediate impact today. Please complete and submit this form to take part in the Legacy Challenge.

Please note that your communication with us is strictly confidential and our goal is to ensure that your wishes will be carried through exactly as you envision. We will contact you shortly to discuss your gift and answer any questions you may have.

Yes, I would like to document a future gift of \$100,000 or more through my estate plan and claim the challenge funds for an immediate donation to the department, program, project or area within the McCombs School that I choose.

Name (first last)

Spouse/Partner (optional)

Phone Number

Email

I have, or would like to, make an estate gift to the McCombs School of Business through a

- Will or living trust
- Beneficiary designation of my life insurance policy
- Beneficiary designations from my retirement or bank account
- Charitable gift annuity
- Charitable lead trust
- Charitable remainder trust

I would like my gift to be designated to (department, program, area)

The purpose of my gift is to

- Provide scholarships or fellowships
- Support faculty
- Support the McCombs School of Business, unrestricted
- Undecided
- Other

I estimate the amount of my gift to be

I am inspired to make this gift because/ in honor/ in memory of

Thank you for telling us about your gift! You are now a member of the Texas Leadership Society, a group of more than 2,000 loyal Longhorns and friends generously making a difference for future Longhorns.

As a member you'll receive:

- A complimentary subscription to our semi-annual publication Texas Leader
- An invitation to our annual Texas Leadership Society event with university leaders, faculty and students
- A Texas Leadership Society lapel pin
- Invitations to other donor-only events

Yes, I would like to be a member of the Texas Leadership Society and would like my (our) name(s) to appear in The University of Texas at Austin publications/and or website and would like my(our) name(s) displayed as:

Yes, I would like to be a member of the Texas Leadership Society, but do not want my name listed as a member in The University of Texas at Austin publications and/or website.

No, I would **not** like to be a member of the Texas Leadership Society, even though I do have a planned gift for the McCombs School of Business.

.....

Once you complete this form, please email it to **Byron Liles** at byron.liles@austin.utexas.edu, and he can assist you with any questions about the Legacy Challenge or your estate planning needs.

.....

As with any decision involving your assets and/or estate, we urge you to seek the advice of your professional counsel when considering a gift to The University of Texas at Austin.