



LEGACY GIFT CONFIRMATION FORM

We are grateful that many members of the Chapman Family share with us that they have included the university in their estate plans. The following are some reasons most donors choose to inform Chapman about their legacy gifts:

1. Peace of Mind

It allows Chapman to clearly understand your gift intentions.

2. Designating a Purpose

It provides you with the opportunity to specify what your legacy gift will support.

3. Inspiring Others

Your visionary planning will create a legacy of leadership for Chapman’s future.

4. No Obligations

We respect that circumstances and priorities may change.

If you have included Chapman University in your estate or intend to do so, please take a moment to complete this confidential form and return it to us:

Name(s): _____ Birthdate(s): _____

Address: _____

City: _____ State: _____ Zip Code: _____

Phone 1: _____ (cell home work)

Phone 2: _____ (cell home work)

Email: _____

Gift Details

I/We **have already** included Chapman in our will or living trust.

I/We **have already** included Chapman as a beneficiary of a retirement plan, life insurance policy, or other payable/transfer on death account.

I/We **have already** included Chapman as a beneficiary of a charitable gift annuity or charitable remainder trust.

I/We **intend to include** a legacy gift for Chapman in my/our estate in the future.

Designating Your Gift

Documenting your gift intentions with Chapman provides you the opportunity to specify what your future gift will support, ensuring your legacy will be meaningful and personal. If you need help in finding the purpose that best represents your passion at Chapman, we would be honored to assist you. Gifts of \$50,000 or more may create an endowment (permanent fund).

Unrestricted

Specific purpose: _____

Approximate gift amount (we will never share this without your permission): \$ _____

This is not a legally binding document but assists Chapman University in planning for the future



CHAPMAN UNIVERSITY

CHARLES C. CHAPMAN LEGACY SOCIETY

Please allow us to thank you for your generosity. The Charles C. Chapman Legacy Society celebrates those caring and visionary individuals who, through their estate plans, build the future of Chapman University. You can become a member of the Legacy Society if you name Chapman as a partial or full beneficiary in your estate plan through a will, living trust, beneficiary designation, charitable gift annuity, charitable trust or life insurance policy.

Benefits of membership in the Legacy Society include:

- Invitations to exclusive Charles C. Chapman Legacy Society member events
- New member recognition by the president of Chapman University
- Your name displayed on the Charles C. Chapman Legacy Society wall in Argyros Forum
- Ongoing subscription to Chapman Magazine and other university publications
- Deeper relationship with Chapman University
- Inspire others to consider their own Chapman legacy

Name(s) for recognition should read as follows:

I/We prefer to remain anonymous

Even if you prefer not to be recognized as a member of the Legacy Society, we still request that you notify us of your future gift intentions. This will give you the opportunity to have your exact wishes noted in our records, and we can seek clarification when needed. Be assured this information will be held in the strictest confidence.

Donor(s) signature(s): _____ Date: _____

_____ Date: _____

Contact Us

If you have any questions or wish to discuss your gift or recognition options, please contact:

David B. Moore (MA '09)

(714) 516-4590

dmoore@chapman.edu

Lindsey N. Jacobs '09 (MA '18)

(714) 628-7311

ljacobs@chapman.edu

If you are considering a legacy gift, you should consult your own legal and tax advisors.

We are glad to provide you and your advisors with detailed information.



This is not a legally binding document but assists Chapman University in planning for the future