

# Heritage of St. Francis Society Letter of Intent



Through this letter of intent, I confirm my desire to advance the mission of Marian University to provide an education that profoundly transforms lives, society, and the world.

I have made/intend to make provisions for Marian University through a (see reverse side for gift descriptions):

Bequest	Life insurance policy
Gift via charitable trust	Retirement plan
Charitable gift annuity	Other _____

Please call me to discuss the above and other options to further document my intentions.  
Enclosed is a copy of my planned giving instrument (e.g. will, trust, etc.).

**Area of designation:**

Marian University endowment  
Area of greatest need  
Other \_\_\_\_\_

**The approximate value of my gift is\*:**

A percentage (%) of my estate \_\_\_\_\_  
A dollar (\$) amount \_\_\_\_\_  
Other \_\_\_\_\_

\* We understand it is difficult to commit to a fixed dollar amount due to potential uncertainties. You may find it easier to commit to a percentage of your estate such as 10 percent.

This letter of intent indicates my desire to take part in Marian University's Heritage of St. Francis Society. It is not legally binding and disclosure of the information is not required. However, we ask for this information in order to document and steward your gift, as well as to officer counsel if appropriate. All information is considered confidential.

Name \_\_\_\_\_ Birthdate \_\_\_\_\_

Spouse Name \_\_\_\_\_ Birthdate \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

I would like to remain anonymous.

I would be willing to provide a donor testimonial in a Marian University publication regarding my interest and experience in charitable giving to Marian University.

To encourage others to participate in deferred giving and to leave a legacy, I give permission to Marian University to publicly recognize me as a member of the Heritage of St. Francis Society. Please acknowledge me as:

**Please return completed form to:**

John Finke  
Vice President for Institutional Advancement  
Marian University  
3200 Cold Spring Road  
Indianapolis, IN 46222-1997



*It is important for donors to consult with their legal and financial professionals before entering into any gift agreement. Each situation involving financial planning, estate planning, and charitable giving is different, thus requiring the attention of a qualified estate planning attorney and financial advisor.*

The form can also be submitted electronically to John Finke at [jfinke@marian.edu](mailto:jfinke@marian.edu).

# Planned Giving Opportunities

*An investment in human flourishing and leadership*

**Documented planned gifts qualify the donor(s) for the prestigious Heritage of St. Francis Society.**

	TYPE	DESCRIPTION	DONOR BENEFITS
<b>Income Gifts</b>	<b>Charitable Gift Annuity</b> <i>(irrevocable)</i>	Donor funds a gift annuity with cash or stock and receives lifetime income for one or two lives.  Assets transfer to Marian University at time of death of a single annuitant or at the death of the second life.	<ul style="list-style-type: none"><li>• Fixed income for one or two lives.</li><li>• Portion of income is tax-free.</li><li>• Partial income tax deduction.</li><li>• Possible capital gains tax savings.</li></ul>
	<b>Charitable Trusts</b> <i>(irrevocable)</i>	A trust funded with cash, stock, land, and other assets will generate either variable or fixed income to the donor and other beneficiaries for life or a period of years. Assets will transfer to Marian University at the end of the trust period or at death of the donor, or surviving spouse or beneficiary.	<ul style="list-style-type: none"><li>• Fixed or variable income is generated.</li><li>• Partial income tax deduction.</li><li>• Avoid capital gains tax when assets are added to the trust.</li><li>• Possible estate tax savings.</li></ul>
<b>Deferred Gifts</b>	<b>Bequests</b> <i>(revocable)</i>	Donor names Marian University in will or trust and designated assets are transferred at time of death.	<ul style="list-style-type: none"><li>• Donor retains assets during life.</li><li>• Donor maintains control of assets.</li><li>• Estate tax deduction for the full amount of the bequest.</li></ul>
	<b>Life Insurance</b> <i>(revocable and irrevocable)</i>	The donor can structure a revocable gift by naming Marian University as beneficiary. Donor who names university as both owner and beneficiary establishes an irrevocable life insurance gift.	<ul style="list-style-type: none"><li>• Make a substantial gift at very little cost.</li><li>• Income tax deduction for cash value and/or premiums paid.</li><li>• No estate tax.</li><li>• Appealing to young donors wishing to make a significant gift.</li></ul>
	<b>Retirement Assets</b> <i>(revocable)</i>	Donor names Marian University as a beneficiary for a fixed amount, percent, or a remainder amount of a qualified retirement plan.	<ul style="list-style-type: none"><li>• Avoid both income and estate taxes when assets are transferred directly from the plan to Marian University.</li></ul>

For more information, please contact John Finke, vice president for institutional advancement, at [jfinke@marian.edu](mailto:jfinke@marian.edu) or 317.955.6202.

[marian.edu/plannedgiving](http://marian.edu/plannedgiving)



Marian University is sponsored by the Sisters of St. Francis, Oldenburg, Indiana.

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