



BUILD A ROOSEVELT LEGACY

Beneficiary Designation & Estate Gift Intent Form

When you include Roosevelt in your estate plans, you are choosing to support the Roosevelt students of tomorrow – ensuring their access to an education grounded in excellence, diversity and equity.

Please complete this form and return a copy to the Office of University Advancement by mail or email, acknowledging your intent to designate Roosevelt University as a beneficiary in your estate, trust, retirement plan or insurance policy. A copy of official documentation recognizing Roosevelt University as a beneficiary is **requested, but not required** at this time. This document is not legally binding, and we understand that you may choose to change your bequest at any time.

TELL US ABOUT YOU:

Donor Name: _____ Donor Date of Birth (MM/DD/YYYY): _____
Donor Name: _____ Donor Date of Birth (MM/DD/YYYY): _____
Address: _____
Phone: _____ Email: _____
Roosevelt Affiliation: _____

TELL US ABOUT YOUR GIFT:

I wish to direct my gift where it is most needed by Roosevelt University.

Other:

I leave [% of estate/\$ amount/residue] _____ to Roosevelt University, a not-for-profit corporation (tax ID 36-2167854) to support Roosevelt University's [college/department/program/initiative/fund]

Note: Donors are highly encouraged to develop a gift agreement in partnership with our office, which will further outline the intent of your bequest.

HOW WOULD YOU LIKE YOUR GIFT TO BE RECOGNIZED?

I/We would like to be listed as Franklin and Eleanor Roosevelt Society member(s). Please list my/our name(s) as: _____

I/We wish to remain anonymous.

Signature: _____ Date: _____

LET'S CONNECT

Please submit this form to:

Roosevelt University
Attn: University Advancement
430 S. Michigan Ave., WB1800
Chicago, Illinois 60605
advancementservices@roosevelt.edu

To speak with a member of our team, contact:

Office of University Advancement
1-888-RU-ALUMS
advancementservices@roosevelt.edu

Thank you for your generosity and for building a Roosevelt legacy. Your estate gift will lay the foundation for the University's future, while making certain that your personal philanthropic intentions are honored.

