**Accompanying Document to Soliciting, Accepting and Processing Gifts**

**and Grants from Private Sources**

**UPPS 03.05.01**

**ATTACHMENT VIII**

**Sample Anonymous Estate Intention Letter**

**(For Wills, Trusts, IRAs, Retirement Plans, Life Insurance)**

Date

Dr. Denise M. Trauth

Texas State University-San Marcos

Office of the President

601 University Drive, JCK 1020

San Marcos, TX 78666-4682

Dear President Trauth:

It is my pleasure to inform you that one of my clients, who wishes to remain anonymous at this time, has named Texas State University-San Marcos as a beneficiary of his/her estate plan. This letter signifies my client’s intention to keep in force in his/her estate plan an estate gift currently estimated at $amount to the University for the further benefit of college/school/center

Understanding that my client’s gift intention is completely revocable, I will inform you should my client change his/her intent toward the University or should the dollar value of his/her estate’s potential donation significantly increase or decrease.

On behalf of my client, I hope that his/her charitable estate gift will inspire others to contribute to Texas State University.

Sincerely,

Attorney’s Signature

Attorney

Name of Attorney

Address

Address

City, State, Zip

City, State, Zip

Date Received:

Signature Assistant Vice President for Development

As with any decision involving your assets, we urge you to seek the advice of your professional counsel when considering a gift to Texas State University-San Marcos.