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

**and Grants from Private Sources**

**UPPS 03.05.01**

**ATTACHMENT XII**

**Sample Insurance Owner/Beneficiary**

**Designation Language**

I hereby name the President of Texas State University-San Marcos as the owner and beneficiary of my Name of Insurance Company and Policy # with a face value of $ amount. I designate that upon my death, the proceeds will be distributed to Texas State University-San Marcos. This gift shall be for the further benefit of the college/school/center. (If this gift is for the creation of an endowment, then the terms of the endowment should be set forth in a separate letter of instructions, to be referenced by the ownership/beneficiary designation form).

Date

Signature Date

Printed Name

Printed Name

Address

Address

City, State, Zip

City, State, Zip Code

Additional information for ownership/beneficiary designation form:

Tax Identification Number for Texas State University-San Marcos: 74-6002248

Mailing Address:

Texas State University-San Marcos

601 University Drive

JCK 960

San Marcos, Texas 78666

Phone number: 512.245.2396

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.