

Planned Gift Notification / Charter Member Enrollment Form

CONFIDENTIAL

A legacy gift reflects your values and is an important way to make a lasting impact.

Making a legacy gift is one of the most important ways to ensure that OLLI at AU remains a vibrant organization for years to come. By naming Osher Lifelong Learning Institute at American University as a beneficiary of your will, retirement plan, IRA, life insurance policy or bank or brokerage account, you can achieve attractive tax benefits when the gift occurs, and the terms of the gift can be modified if your circumstances change.

Please complete this first page, print, sign and return it with any supporting documents to:

OLLI at American University
4400 Massachusetts Avenue NW
Washington, DC 20016
Phone: 202-895-4860

You may also submit the completed form and any supporting documents as attachments via email to: olli@american.edu

Your information will be kept confidential, and we will only recognize your legacy gift with your approval. Questions? Contact our office at 202-895-4860 or email olli@american.edu.

DONOR INFORMATION

Name(s): _____
Address: _____
City: _____ State: _____ Zip: _____
Telephone Number(s): _____ Email: _____

GIFT INFORMATION: Please provide the approximate amount of gift to OLLI at AU and check all boxes that apply as the source of the gift. Amount of gift: \$ _____

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| <input type="checkbox"/> Beneficiary & POD (Payable on Death) Designations: | <input type="checkbox"/> Will |
| <input type="checkbox"/> Bank/investment account(s), Brokerage account, Certificate of Deposit, Savings account | <input type="checkbox"/> Trust: |
| <input type="checkbox"/> Donor-advised fund | <input type="checkbox"/> Living Trust |
| <input type="checkbox"/> Life insurance | <input type="checkbox"/> Charitable Remainder Trust |
| <input type="checkbox"/> Retirement plan assets (IRA, 401k, 403b) | <input type="checkbox"/> Real Estate |
| | <input type="checkbox"/> Other Asset(s) |

Legacy Society Member Signature: _____ **Date:** _____

OLLI at AU is a 501(c)3 nonprofit. **Designate gifts to:** Osher Lifelong Learning Institute at American University, IRS Tax ID: 52-1636891 – 4400 Massachusetts Avenue NW – Washington DC 20016 – 202-895-4860