



Edward J. Mortola Heritage Society Enrollment Form

A planned gift to Pace University will provide critical support for generations of talented, hardworking students and permanently enshrine your legacy and memory on campus. When you have completed your estate plan, please let us know and provide documentation of your commitment (copy of relevant page of the will, etc.) for our files so we may properly thank you. Your expression of intent on this form shall not create a legally enforceable obligation and may be amended in writing at any time.

Yes, I/we have made a commitment to Pace University in my/our estate plan.

Name(s) as you would like to appear on recognition

Date of Birth

Address

City, state, and zip code

Home, business and/or mobile telephone

Email (*Optional*)

The bequest will be funded by (check one):

- | | |
|--|---|
| <input type="checkbox"/> Will or living trust | <input type="checkbox"/> Life insurance policy |
| <input type="checkbox"/> Creation of a charitable lead trust | <input type="checkbox"/> Donor-advised fund |
| <input type="checkbox"/> Retirement plan/IRA/401(k) | <input type="checkbox"/> A gift of real estate, securities, or other property |

Other: _____

Preferred area of support:

- Unrestricted Capital improvements Programmatic support
 Scholarship Other

If Other, please specify _____

I hereby give ____ % or US\$_____ to Pace (*anticipated amount is necessary to determine recognition.*)

- I wish to remain anonymous.
 Please do not provide recognition.
 You have permission to include my name as a society member.

Signature

Date

Signature

Date

Notice

Remember to consult independent tax and/or legal advisers before making any charitable gift.

Requests for sample bequest language

We can provide sample language for the program or area you wish to support. Once completed, mail this form to:

Office of Planned Giving
Development and Alumni Relations
Pace University
One Pace Plaza
New York, NY 10038

You can also submit your form online at: www.pace.edu/plannedgiving