



## Intent to Establish Endowment

It is my intent to establish an endowment with the Alabama A&M University Foundation, Inc. I am aware that the minimum corpus to create an endowment is \$25,000.00—with a minimum initial payment of \$5,000.00. It is my understanding that I have a maximum of five years to fund the minimum corpus of the fund.

As the donor, I will be entitled to:

- Name the endowment;
- Establish criteria for administration of the endowment, subject to University and IRS regulations;
- Receive an annual statement of the endowed fund; and
- Receive a tax deduction for my contributions to the endowment.

As the donor, I understand that:

- The endowment belongs to the Foundation;
- I am not permitted to select a scholarship recipient; and
- An initial distribution will not occur until one year following the minimum corpus has been achieved.

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### DONOR INFORMATION

Individual: \_\_\_\_\_

Organization: \_\_\_\_\_

Intended use of Endowment: \_\_\_\_\_

Primary Address: \_\_\_\_\_

\_\_\_\_\_

Email Address: \_\_\_\_\_

Primary Phone: (\_\_\_\_) \_\_\_\_\_

**Intended Principal Donation: \$** \_\_\_\_\_

Initial Payment: \$ \_\_\_\_\_

2<sup>nd</sup> Year Payment: \$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_

3<sup>rd</sup> Year Payment: \$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_

4<sup>th</sup> Year Payment: \$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_

5<sup>th</sup> Year Payment: \$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_

\* Should the principal donation not be met within a five-year period, the Foundation reserves the right to combine funds with an existing fund that closely aligns with the donor's original intention. If available, the donor will be notified and consulted prior to transfer of the funds.

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Donor \_\_\_\_\_ Date \_\_\_\_\_

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Donor \_\_\_\_\_ Date \_\_\_\_\_

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Advancement Office Representative \_\_\_\_\_ Date \_\_\_\_\_