UCI Paul Merage School of Business
CENTER FOR INVESTMENT AND WEALTH MANAGEMENT (CIWM)
Membership Pledge Agreement Form

Please mail this completed form to:
Lee Anne Maki, Associate Director Center for Investment and Wealth Management (CIWM)
The Paul Merage School of Business
4293 Pereira Drive, Suite 3401
Irvine, CA 92697-3125
(949) 824-2675

Company Name: ________________________________ (please print clearly)
Address:
(street) ________________________________ (city) ________________________________ (state) ________________________________ (zip code)

Primary Contact: ________________________________ (name) ________________________________ (title)
Telephone: ( ) ________________________________ Fax: ( ) ________________________________ Email: ________________________________

GIFT:
☐ Enclosed is our check payable to UC FOUNDATION #3148 in the amount of $

☐ Please charge this $______________ gift to our credit card

PLEDGE:
☒ ☐ We irrevocably pledge $25,000, support The Center for Investment and Wealth Management, at
The Paul Merage School of Business (3148).
I/We would like to pay: $ 5,000 ☐ Monthly  ☐ Quarterly  ☐ Semi-Annually  ☒ Annually; Starting:
____________________________________________________________________________
(pledge must be fulfilled within a maximum of 5 years)

PAYMENT:
☐ Please send pledge reminders to the above address or:
____________________________________________________________________________

☐ Please charge my ☐ Personal –OR-- ☐ Business credit card.
Card Type: ☐ Visa  ☐ MasterCard  ☐ American Express  ☐ Discover

Name of Cardholder: __________________________________________

Card Number: ____________________________________________ Expiration Date: ________

Billing address (if different than above): __________________________________________

SIGNATURE of Authorized Representative:

________________________________________________________________________
Signature Date

Name: Title:

☐ I do not wish to have my name listed as a donor.

Privacy Notice

The 1977 California Information Practices Act requires UCI to inform individuals asked to supply information about themselves of the following:
- UCI is requesting this information to update the general resource files of the Office of University Advancement. Furnishing this information is strictly voluntary and will be maintained confidentially.
- This information may be used by other University departments but will not be disseminated to others except if required by law.
- You have a right to review your own data file. Inquiries should be forwarded to the Manager of Gift Administration, Office of University Advancement, 100 Theory, Suite 250, University of California, Irvine 92617.

Donor’s Consent

UC Irvine is grateful for the support it receives from friends and alumni. One of the ways our thanks is expressed is through listing the names of donors in various publications and press releases. Should you not wish that your name appear as a donor, please notify our office and also check the appropriate box on this form.

The University of California, Irvine Foundation

The University of California, Irvine Foundation is a California nonprofit, public benefit corporation organized for the purpose of encouraging private support for the benefit of UCI and is recognized under both federal and state laws as a qualified recipient of tax-deductible, charitable contributions (federal ID 95-2540117). Responsibility for governance of the Foundation, including investments, is vested in its board of trustees which is composed of community leaders and senior campus administrators. All gifts are subject to UCI’s administrative fee policies for gifts to the campus.

Binding Obligation
The donor intends this gift and/or pledge to be fully enforceable against the donor to the extent that the obligation has not been satisfied by gifts completed following the date of this gift and/or pledge.

**Future Considerations**
In the unlikely event that at some future time it becomes impossible for this gift to serve the specific purpose for which it was created, the Chancellor shall direct that the gift be devoted to purposes that he/she deems to be the most consistent with the wishes of the donor, and if possible, in consultation with the donor or the donor’s successors or assigns.

**Remittance Advice**
Please make your check payable to “UCI Foundation #3148” and mail it to Lee Anne Maki, CIWM, 4293 Pereira Drive, Irvine, CA 92697-3125. Please write “pledge payment” in the memo section or include a copy of this completed pledge form with our payment. To inquire about other forms of payment, please contact the Foundation Accounting office at 949-824-1612. Thank you!