

Estate gift form

Thank you for including a gift in your estate plan, which will help sustain and strengthen the University of Minnesota. This form is to help you provide information about your gift to ensure that it will be used in accordance with your wishes.

Gift information

I/we have made a provision for this gift through a:

Will or trust Donor-advised fund remainder* IRA/retirement plan*
Charitable remainder trust (please attach copy) Life insurance* Other

*Name of organization/company where assets are held:

For long-term planning purposes, the estimated value of this gift as of this date is:

(If your gift is a percentage of your estate, or a specific asset, please indicate the approximate current value of your gift.)

Any supporting information you are willing to share with us, including a copy of the gift provisions for the University and contact information for your personal representative or trustee, would help us in administering your gift. We understand the value and type of your gift may change over time, and would appreciate notification of such changes. Any information you share will be kept confidential.

Gift designation *(if multiple designations, indicate percentages Space available on reverse for special instructions.)*

See attached gift designation instructions

Donor information

This document does not create a binding commitment. By signing this form, you are simply acknowledging your current plans to benefit the University and giving us direction as to your wishes.

Name

Name (if applicable)

Address

City State ZIP

Phone Email

Signature Date

Signature Date

Heritage Society

All donors of planned gifts become members of the Heritage Society of the University of Minnesota President's Club.

Please publish my/our name(s) as follows:
(Names only—gift amounts are not published)

Please do not publish my/our name(s). This gift is anonymous.

Return completed form to:

University of Minnesota Foundation
P.O. Box 860266
Minneapolis, MN 55486-0266

UNIVERSITY OF MINNESOTA DULUTH
Driven to Discover

All gifts to the University of Minnesota Foundation are subject to and administered in accordance with the provisions of the Foundation's governing documents that relate to gift acceptance and administration, which include the Foundation's ability to repurpose funds to a use as close as possible when the original use is no longer capable of fulfillment.

Special instructions