



Statement of Future Gifts

Donor Name _____

Date of Birth _____

Spouse/Partner Name (If Joint Gift) _____

Date of Birth _____

Donor Address _____

Email Address _____

NEW GIFT
 UPDATE TO PREVIOUSLY DOCUMENTED GIFT

Gift Information:

I have made a provision to benefit the University of Georgia Foundation as follows:

- Outright bequest payable upon my death directly to the University of Georgia Foundation.
- Provision in will of surviving spouse/partner payable to University of Georgia Foundation.
- Beneficiary designee of a life insurance policy, IRA, pension plan, 401(k), or 403(b).
- Testamentary trust established at death, naming University of Georgia Foundation as the beneficiary.
- Other: _____

Please attach a copy of the relevant language from your estate documents or other documentation confirming the University of Georgia Foundation has been designated as the beneficiary.

The estimated current value of my future gift to the Foundation is \$ _____. However, it is understood that future fluctuations/changes in the market/economy may have an impact on this value.

Please direct the proceeds from my future gift as follows:

- Unrestricted gift to the University of Georgia Foundation.
- To benefit an existing fund. Fund Name: _____ Fund Number: _____
- To create a new fund. (If you wish to create a new fund, please contact the Office of Gift and Estate Planning at 706-542-8140 to confirm that your gift meets minimum endowment requirements and to create a Planned Gift Agreement, the document which outlines criteria for use of the gift.)

Donor Recognition Preferences:

All donors of future gifts become members of the Heritage Society. To ensure your recognition preferences are honored, please select one of the below options:

- The University has my permission to publish my/our name(s) along with other Heritage Society members in the annual Honor Roll of Donors (as part of the *Report to Donors*) and other UGA publications as appropriate. Please publish my/our name(s) as follows: _____ **(No value will be printed or released without permission.)**
- Please do not publish my/our name(s) in the annual Honor Roll of Donors or any other publications.

Benefits of membership to the Heritage Society include, but are not limited to, Presidential acknowledgment, a Heritage Society welcome packet, and invitations to exclusive events. Please select one of the below options:

- I/we would be pleased to accept the benefits of membership to the Heritage Society.
- I/we do not wish to receive the benefits of membership to the Heritage Society.

I would like to designate the following individual(s) as successor recipient(s) of any information relating to my gift:

Name: _____ Address: _____ Relation: _____

Name: _____ Address: _____ Relation: _____

THANK YOU
for supporting
the University
of Georgia!

DONOR SIGNATURE: _____ DATE: _____

DONOR SIGNATURE: _____ DATE: _____