



Planned Gift Notification

As a demonstration of my / our support of UNCF, I am / we are pleased to have made a bequest provision as indicated below:

<u>Planned Giving Vehicle*</u>	<u>Value of Gift</u>	<u>OR</u>	<u>Percentage Allocated /</u>
<i>Please check applicable options</i>			<u>Estimated Value of Gift</u>
<input type="checkbox"/> Will or Revocable Trust	_____		_____ / _____
<input type="checkbox"/> Life Insurance Policy <i>Beneficiary Designation</i>	_____		_____ / _____
<input type="checkbox"/> Retirement Plan (401(k), IRA) <i>Beneficiary Designation</i>	_____		_____ / _____
<input type="checkbox"/> Charitable Gift Annuity	_____		_____ / _____
<input type="checkbox"/> Other: _____ <i>Please describe</i>	_____		_____ / _____

**To facilitate our ability to honor your intentions set forth above, we would greatly appreciate a copy of the indicated document (or the appropriate sections thereof) for safekeeping in our confidential files. Thank you.*

I / We understand this form does not create a binding obligation, all gifts are revocable, and any details about my / our gift will remain confidential unless I / we say otherwise. UNCF understands that the amount of my / our future gift may change or be terminated.

Donor Name (print): _____

Signature: _____ **Date:** _____

Spouse name (if joint): _____

Spouse Signature (if joint): _____ **Date:** _____

Address: _____ **City:** _____ **State:** ____ **Zip Code:** _____

Phone Number: _____ **Email Address:** _____

Gift Purpose:

If / when this gift is received by UNCF, it is my wish that it be used for the following purpose:

- General Purposes / Area of Greatest Need
- Please contact me to discuss how my gift can be used

Please return this form to: UNCF | Jason Osborn, Major Gifts Officer, Planned Giving | 1805 7th Street, NW, Washington, DC 20001 | Phone: (202) 810-0168 | email: jason.osborn@uncf.org



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Recognition:

Donors who provide a planned gift to benefit UNCF will be welcomed into the **1944 Society**, which honors those who have made legacy gifts to the organization. The **1944 Society** provides members with opportunities to connect with others interested in UNCF's important work and learning more about our recent endeavors. UNCF honors your commitment to our mission to help under-represented students become highly qualified college graduates and to ensure that our network of member institutions remain a respected model of best practices in higher education.

Please list me / us as member(s) of the **1944 Society** as follows:

I / we prefer no public recognition and would like to remain anonymous

Thank you for your commitment to include UNCF in your estate plans. We ask that you complete this form with as much detail as you are willing to share. Any information about your gift will remain confidential and will not create a binding obligation. As always, please consult your financial, tax, and legal advisors while making these decisions. We are grateful for your vision and generosity.