



# The University of Georgia

®

## STATEMENT OF FUTURE GIFTS

Name: \_\_\_\_\_ Class: \_\_\_\_\_ Birthdate: \_\_\_\_\_

Spouse: \_\_\_\_\_ Class: \_\_\_\_\_ Birthdate: \_\_\_\_\_

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

- I/we have made provision(s) to benefit the University of Georgia in the following manner(s):
  - Outright bequest payable upon my/our death(s) directly to the UGA Foundation for the University of Georgia
  - Provision in will of surviving spouse payable to UGA Foundation for UGA at death
  - Charitable remainder trust with UGA Foundation for UGA named as a charitable beneficiary
  - Testamentary trust established at death, naming UGA Foundation for UGA as a charitable beneficiary
  - Life insurance payable to UGA Foundation for UGA
  - Beneficiary designee on an IRA, pension plan, 401(k), 403(b) or revocable living trust
  - Other: \_\_\_\_\_

Today's value of our future gift provision to UGA is approximately \$\_\_\_\_\_. However, UGA and I both understand that future fluctuations/changes in the market/economy may have an impact on this current value.

- Gift designation(s):  
\_\_\_\_\_  
\_\_\_\_\_

**Note:** Undesignated and unrestricted gifts are the most powerful resources because of the ever-changing priorities and needs in higher education.

- Enclosed is a copy of the estate plan document that pertains to our future gift for UGA.
- I/we accept membership in The University of Georgia's Heritage Society.
- The University has permission to include my/our name(s) in the annual endowment report along with other Heritage Society members. **(No value will be printed or released without permission.)**
- Information regarding the future gift should be treated as **confidential** and **not listed** in any reports.
- Please inform the following department(s) or individual(s) of the future gift plans:  
\_\_\_\_\_

Signature: \_\_\_\_\_ Date \_\_\_\_\_

Signature: \_\_\_\_\_ Date \_\_\_\_\_

**If you have any questions, please contact the UGA Office of Gift & Estate Planning – 706-542-8138**

*Thank you for continuing UGA's legacy and helping secure UGA's future for generations to come.*