



UNIVERSITY OF GEORGIA

STATEMENT OF FUTURE GIFTS

Donor Name _____ Date of Birth _____
Spouse/Partner Name (If Joint Gift) _____ Date of Birth _____
Donor Address _____
Email _____ Phone _____

GIFT INFORMATION

I have made the following provision(s) for the University of Georgia Foundation to be used to benefit:

- ☐ Outright bequest payable upon my death directly to the University of Georgia Foundation.
- ☐ Provision in will of surviving spouse/partner payable to the 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 this document is not binding on my estate as 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 support:
- ☐ To benefit an existing fund. Fund Name: _____
- ☐ To create a new fund. Contact: The Office of Gift and Estate Planning at 706-542-8140.

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). 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: _____

Please return this form to the UGA Office of Gift and Estate Planning | University of Georgia | Athens, GA 30602 | Phone: (706) 542-8140