

Thank you for including a gift in your estate plan, which will help sustain and strengthen the University of Minnesota Duluth. Your generosity also helps advance *Driven*—the largest philanthropic campaign in UMD's history. 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)*

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 UMD 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 estate or other 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Please do not publish my/our name(s).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
Attn: Planned Giving
200 Oak Street SE, Suite 500
Minneapolis, MN 55455-2010



UNIVERSITY OF MINNESOTA

Driven to DiscoverSM

Crookston Duluth Morris Rochester Twin Cities

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