



FOUNDATION

Confirmation of Your Legacy Gift for the University of Central Oklahoma

This form is merely to advise the University of Central Oklahoma Foundation of your legacy gift intent and will be held in the strictest of confidence. It is in no way binding.

Name(s): _____ Class(es): _____

Address: _____

Phone: _____ Email: _____

Birth Date(s): _____

Type of Bequest: Please describe your deferred gift (or attach a copy of documentation, if you prefer)

- Outright bequest in my will
- Residuary provision in my will
- Life Insurance Policy under which the University of Central Oklahoma Foundation is named beneficiary.
Name of Life Insurance Company _____ Phone _____ Policy # _____
- Trust under my will with the UCO Foundation is named beneficiary _____
- Other: (please describe) _____

If you are comfortable doing so, please provide an estimate of the current value of your deferred gift to Central.
Estimate \$ _____ **or %** _____ All such information will be kept confidential.

Name, address & phone of the attorney handling my estate plans: _____

How would you like Central to use your gift?

- Unrestricted gift to be used to benefit the University to address its most pressing needs at the time of receipt.
- Designated gift to be used to benefit a specific area at Central (for example, support of students, support of teaching, direct program support, capital project support). _____

Completion of this form will help us ensure that your wishes are fulfilled, and it will also allow us to honor you as a member of the university's 1890 Legacy Society.

Signature _____ **Signature** _____ **Date** _____

By signing this form, you are simply acknowledging your current plans to benefit Central in the future and giving us guidance as to your wishes. Central recognizes that gift planning may change over time, and we hope you will consider notifying us of any relevant changes in your plans. Thank you for your valuable support, and for your interest in providing for future generations of UCO students and faculty who will benefit from your foresight and generosity.

For additional information – or - To return completed forms

University of Central Oklahoma Foundation, 100 N University Drive, Campus Box 133, Edmond, OK 73034
www.ucogiving.org Phone: (405) 974-2770 Fax: (405) 974-3833; Email: foundation@uco.edu (EIN: 73-6108032)

SAMPLE TESTAMENTARY LANGUAGE

“I give (_____ dollars) or (a specific asset, such as securities, real estate or other property) or (all) or (_____ percent) of the rest, residue, and remainder of my estate) to the University of Central Oklahoma Foundation (EIN: 73-6108032) in Edmond, Oklahoma (for its general purpose) or (for the following purpose _____).”

While unrestricted gifts allow Central to allocate funds to areas of greatest need, you may designate your bequest for a particular purpose or use by a specific college, program or activity at UCO. In order to ensure that the evolving educational needs of future generations of students are met, it is advisable to include the following language with restricted gifts:

In the event that at some future time due to changed circumstances, in the judgment of the UCO Foundation, it becomes impractical to apply my bequest to the designated purpose(s), the UCO Foundation shall make such modifications as will appropriately recognize my interests in coordination with University priorities.