

Thank you for making a planned gift to benefit the University of Nebraska. Documenting your future gift is important for both you and the University of Nebraska Foundation. By communicating your intentions, we are able to provide better stewardship and ensure your specific goals for the gift are met. Open communication regarding your gift strengthens a lifelong relationship with the university that will ultimately be made permanent by the legacy you leave.

Getting to Know You

Name: _____ DOB: _____

Email: _____ Phone: _____

Address: _____

City: _____ State: _____ ZIP: _____

Spouse/Additional Donor Name (optional):

Name: _____

Email: _____ DOB: _____

Additional Contact Information (e.g., executor, adviser, power of attorney, family members):**Type of Gift****Confidential Estimated Value as of Today***(If your gift is a percentage of your estate or a specific asset, please indicate the approximate current value of your gift.)*

- | | |
|---|----------|
| ☐ Will or Trust | \$ _____ |
| ☐ Retirement Plan (401(k), 403(b), IRA, Keogh)* | \$ _____ |
| ☐ Life Insurance* | \$ _____ |
| ☐ Donor-Advised Fund* | \$ _____ |
| ☐ Charitable Gift Annuity/Charitable Remainder Trust | \$ _____ |
| ☐ Other | \$ _____ |

**Please indicate name of financial institution and account number.*

Financial Institution: _____ Account #: _____

- ☐ The University of Nebraska Foundation will only receive the gift upon the passing of both donors.
- ☐ The University of Nebraska Foundation will only receive the gift under the following specific contingencies:

My/Our Intention:

- ☐ This gift is unrestricted. | ☐ This gift will be kept anonymous.
- ☐ This gift should be used for the following purpose:

Additional Gift Information:

Please include any additional information you are willing to share that will help us best administer your gift. You may also attach a copy of the gift provisions for the university. Any information you share will be kept confidential.

To help ensure your intent is fulfilled, please direct gifts to the University of Nebraska Foundation, a Nebraska nonprofit corporation, and attach copies of the relevant section of the legal documents describing your gift. The University of Nebraska Foundation's tax ID number is EIN: 47-0379839. The University of Nebraska Foundation encourages you to consult with your legal and financial advisers as you consider your estate plan.

I/We understand that this is not a legal or binding commitment. The University of Nebraska Foundation should understand that the amount of this future gift may be different from the estimated amount.

Signature: _____

Date: _____

Signature: _____

Date: _____

Please return this form to:

University of Nebraska Foundation
Office of Gift Planning
1010 Lincoln Mall, Suite 300
Lincoln, NE 68508

Email: gift.planning@nufoundation.org

Why should you share your gift plans?

Ensure your plans are viable. Correct designation language in wills, trusts and other documents is a vital part of the planning process that makes it easier to follow your wishes for the gift. Documenting your gift provides us the opportunity to review the language and provide advice as needed so you can rest easy, knowing your gift intentions will be honored. When you share a confidential, nonbinding estimate of your gift amount with the foundation, we can help determine if your goals for the gift can be achieved. This proactive, open communication will give you peace of mind and will also ensure that we are able to maximize your gift for the greatest possible impact on campus.

Make an impact right now. Your gift counts. The estimated value of your gift may count toward current fundraising goals, which can inspire others to give as well.

Let us show our gratitude. We want to thank you for your gift during your lifetime by welcoming you into the Burnett Society, regardless of the size of your gift. As a Burnett Society member, you and others with planned gifts to the university will receive invitations to special events throughout the year, such as campus tours, lunches and educational opportunities.

Maintain flexibility. We know circumstances can change and revisions in estate planning are common. By documenting your gift, you are not making your gift binding or irrevocable. However, we do ask that if changes are made, you notify us accordingly so we can update our records.

Visit nufoundation.org/legal to learn about our fees, policies and other information.