

Confirmation of Your Legacy Gift for Duke University

Please let us know about your deferred gift plans.

Bequests, trusts, and other forms of planned gifts have served as the foundation for the growth and success of this great university. If you have named Duke as a beneficiary in a will, trust, retirement plan, or some other deferred giving vehicle, we hope that you will share this good news with us.

This record 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 **Heritage Society**, which recognizes alumni and friends who have provided for Duke through their estate plans or some other form of deferred gift.

Name(s): _____ Class(es): _____
Address: _____
Birth Date(s): _____
Email Address(es): _____

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

- Will Revocable "Living" Trust IRA or Other Retirement Account Donor Advised Fund
 Charitable Remainder Trust Life Insurance Policy Other: _____

How would you like Duke to use your gift? Unrestricted gifts are used by the University to address its most pressing needs at the time of receipt. You may also direct your gift to support areas of Duke that speak to your own passions and Duke experience (for example, scholarships, professorships, research, libraries, gardens, athletics).

If you are comfortable doing so, please provide an estimate of the current value of your deferred gift to Duke. This estimate will allow us to ensure that Duke will be able to use your gift as you have specified above. All such information will be kept confidential. Estimate: _____

May we include your name(s) in periodic donor rosters and lists of **Heritage Society** members?

- Yes, you may print my/our name(s) in **Heritage Society** rosters published by the University.
 No, please do not print my/our name(s) in **Heritage Society** rosters published by the University.

Signature

Signature

Date

This document does not bind you or your estate. By signing this form, you are simply acknowledging your current plans to benefit Duke in the future and giving us guidance as to your wishes. Duke recognizes that gift plans may change over time, and we hope you will consider notifying us of any relevant changes in your plans. We very much appreciate your expression of support for Duke and its important mission.

Please return completed forms, and direct any questions, to:

Duke University Office of Gift Planning, Box 90600, Durham, NC 27708

Phone: (919) 681-0464; Fax: (919) 684-9731; Email: gift.planning@dev.duke.edu