

CONFIDENTIAL STATEMENT OF BEQUEST PROVISION

All contributions, including bequests, are critical to ensuring fulfillment of the University's mission.

As a demonstration of my/our support for the University of Chicago, I am/we are pleased to have made a bequest provision as indicated below:

- Will or revocable trust
- Other type of trust: _____
- IRA or retirement plan beneficiary designation
- Life insurance beneficiary designation
- Other beneficiary designation (e.g., bank account, bond, donor-advised fund): _____

Based on the information available to me/us as of the date hereof, the estimated current value of my/our testamentary gift to the University of Chicago is approximately \$_____.

	Donor	Spouse/Partner
Donor name(s) (please print):	_____	_____
Signature(s):	_____	_____
Date:	_____	_____
Birth date(s):	_____	_____
Address _____		
City _____	State _____	Zip _____
Phone _____	Email _____	

The University understands that this statement of bequest provision is not a legal or binding commitment, and that the amount listed above is an estimate. You have the right to revise this gift at any time if circumstances change. As a courtesy, the University would appreciate notification in that event. Based on the information provided, your gift will be recognized but the details of this form will remain confidential. As always, please consult your financial, tax, and/or legal advisers to determine the benefits of making a planned gift.

Documenting your bequest allows us to better steward your future gift and personally express our gratitude to you now. It solidifies a lifelong relationship with the University that will ultimately be made permanent by the legacy you leave.

Documentation Checklist

Under the University's reporting standards, certain documentation is required for my/our bequest to be included in fundraising totals. To that end, attached are the following items:

- A copy of the portion of the will or trust document or beneficiary designation form referencing my/our planned gift to the University.
- The document's signature page.
- A page indicating the date of the document.
- If the bequest is included as part of my and my spouse/partner's estate plan and will not be realized until the death of the survivor, attached are copies of my spouse/partner's documents from the above list.

Please return this form with any related documentation to:

The University of Chicago | Office of Gift Planning | 5235 South Harper Court | Chicago, Illinois 60615
Phone 866.241.9802 | Fax 773.702.9480 | giftplan@uchicago.edu

Thank you for thoughtfully supporting the University of Chicago's future for generations to come.