



**Thank you for supporting the University of Vermont through an estate commitment.**

Please note, donors retain the right to change or revoke provisions in their estate plans at any time and at their sole discretion. UVM Foundation requests a copy of the actual provisions and requests to be notified if donors make changes that affect the provisions. This Estate Commitment Form does not legally bind donors or their estate.

**1. ESTATE COMMITMENT**

a) I am/We are pleased to support The University of Vermont through an estate commitment:

\_\_\_\_ Specific dollar amount: \$ \_\_\_\_\_

\_\_\_\_ Percentage of estate:

\_\_\_\_\_ % with estimated value of \$ \_\_\_\_\_

b) This estate commitment will be realized based on the lives of the following individuals:

\_\_\_\_ My life alone

\_\_\_\_ My life and that of my spouse / partner

\_\_\_\_ Other: \_\_\_\_\_

**2. GIFT DESIGNATION** (see next page for sample wording for estate provisions)

Unrestricted and may be used where the need is greatest at The University of Vermont.

Restricted for this specific fund name/purpose:

\_\_\_\_\_

To create a new ENDOWMENT fund (name, purpose):

\_\_\_\_\_

To create a new CURRENT USE ONLY fund (name, purpose):

\_\_\_\_\_

**3. DONOR RECOGNITION**

I/We may be listed in Wilbur Society and other donor recognition pieces as:

\_\_\_\_\_

#### 4. CONTACT INFORMATION

Name \_\_\_\_\_

Spouse / Partner Name \_\_\_\_\_

Class Yr(s). \_\_\_\_\_

E-mail \_\_\_\_\_

Address \_\_\_\_\_

City/State/ZIP \_\_\_\_\_

Phones \_\_\_\_\_

**DONOR SIGNATURE** \_\_\_\_\_ Date \_\_\_\_\_

**DONOR SIGNATURE** \_\_\_\_\_ Date \_\_\_\_\_

#### SAMPLE WORDING FOR ESTATE COMMITMENTS

The University of Vermont and State Agricultural College Foundation, Inc. ("UVM Foundation") is a Vermont nonprofit corporation exempted from federal income taxation as a section 501(c)(3) publicly supported charity (federal tax ID 45-1556038). To include UVM Foundation in estate plans, please use one of the following suggested provisions in your will, trust, retirement account or other gift instrument:

**Unrestricted Purpose** — I give and bequeath to the University of Vermont and State Agricultural College Foundation, Inc. ("UVM Foundation"), a nonprofit corporation located in Burlington, Vermont, \_\_\_\_\_ (dollars, percent of estate, securities, etc.) to be used to support the University of Vermont.

**Create or add to an Endowment** — I give and bequeath to the University of Vermont and State Agricultural College Foundation, Inc. ("UVM Foundation"), a nonprofit corporation located in Burlington, Vermont, \_\_\_\_\_ (dollars, percent of estate, securities, etc.) to create or add to an endowment called \_\_\_\_\_ where the income therefrom shall be used for purposes as agreed between me and UVM Foundation (or where the income therefrom shall be used to support \_\_\_\_\_ at the University of Vermont). In the event any part of this provision shall become unlawful, impracticable, impossible to achieve or wasteful, then UVM Foundation's Board of Directors is authorized to make changes it deems appropriate based on my intentions and the mission of UVM Foundation.

**Create or add to a Current-Use Fund (not an endowment)** — I give and bequeath to the University of Vermont and State Agricultural College Foundation, Inc. ("UVM Foundation"), a nonprofit corporation located in Burlington, Vermont, \_\_\_\_\_ (dollars, percent of estate, securities, etc.) to create or add to a fund called \_\_\_\_\_ to be used for purposes as agreed between me and UVM Foundation (or to be used to support \_\_\_\_\_ at the University of Vermont). In the event any part of this provision shall become unlawful, impracticable, impossible to achieve or wasteful, then UVM Foundation's Board of Directors is authorized to make changes it deems appropriate based on my intentions and the mission of UVM Foundation.

*Your gift is administered based on your intentions as well as policies approved by the Board of Directors of UVM Foundation. Visit [uvmfoundation.org](http://uvmfoundation.org) to view statements related to donor rights and privacy; gift, endowment and fee policies; board bylaws and meeting minutes; audited financial statements; IRS forms and documents; and FAQs.*