

**University of Florida Foundation, Inc.**  
**Planned Giving**

Policy #: 2.07  
Effective Date: September 8, 2007  
Responsible Department: Administration

1. **PURPOSE**

To assure the provisions of planned gifts are correct and appropriate.

2. **APPLICABILITY**

All planned gifts including charitable gift annuities, charitable lead and remainder trusts, pooled income fund gifts, insurance policies, Tigert Fund gifts, and life estates.

3. **POLICY**

Planned Giving (PG) provides expertise in the planning, cultivation, and solicitation of "planned gifts" to UF. Because the documentation and execution of many planned gifts may be complex in terms of protecting both UFF and the donor, PG must review all documents relating to such gifts prior to execution by the donor and acceptance by UFF. The donor will always be advised to seek his or her own outside legal and tax advice before executing a planned gift. Minimum gift amounts and policies for different types of planned gifts are set by the Finance Committee of the Board of Directors.

Donors are actively discouraged from naming UFF as the personal representative of their estate. Individual UFF and ODAA employees may not serve as personal representative of an estate involving a gift to UFF.

Specific or residual documented bequests will be recorded by Planned Giving. "Planned gifts" include charitable remainder and lead trusts, charitable gift annuities, gifts of insurance policies, Tigert Fund gifts, and retained life interests.

4. **CLARIFICATION**

Requests for clarification of this policy should be sent to the Senior Director of Development, Planned Giving ([dott@uff.ufl.edu](mailto:dott@uff.ufl.edu)).

Certified as approved by the Executive Committee of the UFF Board of Directors on:  
September 8, 2007

A handwritten signature in black ink, appearing to read "Susan G. Goffman". The signature is written in a cursive style with a large, prominent initial "S".

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Susan G. Goffman, Secretary  
Revision history: Original version