The University of Florida Bequest Society

Over the years, many University of Florida alumni and friends have remembered the university in their estate plans. In recognition of such commitments to the university, UF supporters who document a specific or residual bequest provision of at least $10,000 will be recognized through the University of Florida Bequest Society.

To be recognized in the Bequest Society, simply provide the University of Florida Foundation, Inc. with either a copy of the specific provision that reflects your estate commitment for the benefit of the university or complete the attached Bequest Provision form. Benefactors who document a bequest of $10,000 or more will be recognized in the Bequest Society. Additionally, individuals whose bequest provisions total $100,000 or more will be recognized at the Distinguished level. Donors wishing to remain anonymous can also qualify for membership by completing the Bequest Provision.

Bequests may be designated for the unrestricted use of the university or for a specific college or department. Bequests may also be restricted to a specific purpose of your choice.

Currently, a bequest gift of $30,000 or more may be designated to create an endowed fund in memory of a loved one or to carry your own name. The annual spendable income from the endowed fund, as defined by University of Florida Foundation, Inc. policy, provides perpetual recognition for the person or persons named.

**This annual spendable income could:**

- help provide a medical cure or influence patient care;
- ensure assistance for undergraduate students, graduate students or student athletes;
- fund agricultural, environmental, social or political research;
- provide acquisition or program support for the Harn Museum of Art, the Curtis M. Phillips Center for the Performing Arts, the Powell Hall/Florida Museum of Natural History, the George A. Smathers Libraries or UF’s television and radio stations;
- hire an eminent scholar who will impact future generations of students.

**You decide! How will your gift impact the University of Florida?**

Sample bequest language is illustrated on the last page. If you are considering a specific purpose for your gift, we would be happy to work with you and your advisors to ensure your wishes are carried out.

Statement of Bequest Provision for the University of Florida

CONFIDENTIAL

This documentation will provide a basis for credit given for your proposed gift and recognition in the University of Florida Bequest Society, one of the university’s most prestigious donor honorary organizations.

Name

Spouse’s name

Mailing address

City   State   ZIP

Telephone

UF college and class year (if alumnus)

Relationship to university

Date of birth   Spouse’s date of birth

TYPE OF PROVISION

I have included a specific or residual provision for the University of Florida Foundation, Inc. in my estate plan as follows:

a. Residuary Bequest; estimate of present value: $ 

b. Outright Bequest of specific amount or asset: $ 

c. Outright Bequest in my spouse’s estate plan: $ 

d. Bequest in my Will if my spouse predeceases me and a similar bequest in my spouse’s Will if I predecease my spouse: $ 

e. Trust arrangement with the University of Florida Foundation, Inc. as the remainder beneficiary

Income beneficiaries of trust:

   age:

   age:

University of Florida’s percentage remainder interest: % $ 

Current trustee:

f. Designation of the University of Florida Foundation, Inc. as beneficiary of my qualified retirement plan [IRA, 403(b), 401(k)]: $ 

g. Other (please describe): $ 


TOTAL $ 

PLEASE SEE REVERSE SIDE

PROPERTY OF THE UNIVERSITY OF FLORIDA FOUNDATION, INC.
SAMPLE WORDING FOR ESTATE GIFTS

SAMPLE WORDING OF A TYPICAL BEQUEST TO THE UNIVERSITY OF FLORIDA:
I give and devise to the University of Florida Foundation, Inc. (Foundation), located in Gainesville, Florida, my entire residuary estate (or ____________________________ percent of my residuary estate, or _______________ dollars, or a specific item) to endow* the Donor X fellowship. Income from the fund shall be used to support fellowship awards to graduate students at the University of Florida. It is my specific wish that the Foundation apply for any matching funds that may be available as a result of this gift.

*Gifts of less than $30,000 will be used for current, non-endowed purposes.

PURPOSE OF GIFT

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 Gifts may be unrestricted for the university, a college or academic unit.

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 Gifts may be restricted for a graduate fellowship, undergraduate scholarship, faculty support, research, program support or for the purchase of a building or equipment.

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 Please discuss any specific restrictions with Foundation staff so we can ensure the best possible use of your gift.

PLEASE INDICATE BELOW HOW YOU WOULD LIKE YOUR GIFT TO BE USED.

STATE MATCHING FUNDS

The state of Florida currently provides generous matching funds for endowed gifts of $100,000 or greater, which range from a 50 percent match at $100,000 to a 100 percent match at $2,000,001. Please ask us for more detailed information about these various matching opportunities.

GIFT RECOGNITION

aben
 I wish that my bequest to the university remain anonymous.

(The UF Foundation and the university will respect your request and keep your bequest information anonymous and withhold your name from the university’s Bequest Society Honor Roll.)

aben
 I would like my bequest to be recognized in the Bequest Society Honor Roll under the following name(s).

(Please print.)

Signature ____________________________ Date ____________________________

PLEASE RETURN TO:
University of Florida Foundation, Inc.
Attention: Office of Planned Giving • Post Office Box 14425
Gainesville, Florida 32604-2425 • telephone: (352) 392-5512 • fax: (352) 392-8736