

ESTATE GIFT DECLARATION

Thank you for including the University of Wisconsin-Green Bay Foundation in your plans. This form helps us understand and honor your intentions. It is not legally binding and can be amended at any time. Please consult your own legal, tax or financial advisor.

1 | TELL US ABOUT YOUR GIFT

- ☐ I/We have named the UW-Green Bay Foundation as a beneficiary of a retirement plan, IRA or life insurance policy.
- ☐ I/We have included the UW-Green Bay Foundation in a will or living trust.
- ☐ I/We have established an income-producing charitable gift arrangement, such as a charitable gift annuity or charitable trust, for the benefit of UW-Green Bay.

If available, please provide a copy of the relevant page or beneficiary designation that describes your gift.

GIFT AMOUNT

Please select either dollar amount or percentage of source fund:

- ☐ \$ _____
- ☐ _____ % OF _____
(approx. value of source fund)

GIFT DESIGNATION

Please use my gift toward:

- ☐ Whatever the university determines is its greatest need.
- ☐ Other: _____

2 | CONTACT INFORMATION

NAME(S) - FIRST AND LAST

MAILING ADDRESS

CITY

STATE

ZIP / POSTAL CODE

PHONE

EMAIL

UW-GREEN BAY CLASS YEAR - IF APPLICABLE

RECOGNITION & SIGNATURE

- ☐ Please welcome me to the Niagara Society.
- ☐ I prefer to remain anonymous.

SIGNATURE

DATE