

Confirmation of Deferred Gift

Please return to: Oklahoma State University Foundation ATTN: Office of Gift Planning
 400 S. Monroe | P.O. Box 1749 | Stillwater, OK 74076-1749 | ph. 800.622.4678 | fx. 405.385.5102

This form compiles necessary information for Oklahoma State University Foundation's appropriate administration of your charitable deferred gift. This confirmation of deferred gift form is a record of your intent, a donor-approved reference for future use. Thank you for your gift to support OSU!

This is not a binding legal document. Your signature verifies accuracy of information on the date signed. Details and monetary value of deferred gifts change over time; if possible please inform OSU Foundation staff of substantive changes.

Date _____

Donor Name (Printed) _____

Donor Signature _____

Birth Date of Donor _____

Donor Name (Printed) _____

Donor Signature _____

Birth Date of Donor _____

Type of Gift

- | | | | | |
|---|---|----------------------------|-----------------|-------------------|
| <input type="checkbox"/> Will Bequest (Please circle type) | <i>Specific Amount</i> | <i>Specific Percentage</i> | <i>Residual</i> | <i>Contingent</i> |
| <input type="checkbox"/> Life Insurance (OSUF owner) | <input type="checkbox"/> Life Insurance Beneficiary | | | |
| <input type="checkbox"/> Revocable Trust | <input type="checkbox"/> Charitable Gift Annuity | | | |
| <input type="checkbox"/> Charitable Remainder Unitrust | <input type="checkbox"/> Deferred Gift Annuity | | | |
| <input type="checkbox"/> Charitable Remainder Annuity Trust | <input type="checkbox"/> Charitable Legacy Fund (Donor-advised) | | | |
| <input type="checkbox"/> Retirement Account Designation | <input type="checkbox"/> Other (Please describe) _____ | | | |

Good Faith Estimate of the Gift Value \$ _____

Gift Purpose (See form attached for FCS related gift purposes)

- My/our gift may be used for the University's greatest needs.
- My/our gift is designated for the following purpose(s): _____

Heritage Society

Because of your charitable intentions, you will be included as a member of the Heritage Society. OSU Foundation created the Heritage Society to recognize donors who choose a deferred gift to support the university in upholding its mission. You will join other alumni and friends who have established similar deferred gifts. Your name will be published among other Heritage Society listings in university publications so that others may be inspired to follow your example. If you would prefer to remain anonymous (and not be listed), please check the following:

- No, I/We do not wish to be listed on the Heritage Society Honor Roll in university publications. We would prefer to remain anonymous. (It is the fiduciary responsibility of OSU Foundation to ensure confidentiality of donor information).

OSUF Staff

Name of OSU Foundation staff member assisting in completion of this form _____
 Print Name



DEFERRED/PLANNED GIFT OPTIONS

Attachment to **Confirmation of Deferred Gift [gift purpose]** form from the Oklahoma State University Foundation

My/our gift is designated for the following purpose(s): (check all that apply)

Family & Consumer Sciences (FCS) Cooperative Extension Excellence Fund (to address FCS greatest needs)

Cooperative Extension-FCS Ambassadors Fund (grants to FCS Extension faculty & educators)

Gladys T. Logue Leadership Endowment (for leadership training)

Marilyn Burns Recognition Fund (for home-based, microbusiness programming)

Cooperative Extension Professional Development Fund (to enhance professional skills)

Donna Cadwalader Research & Development Fund (for Extension related research)

Lois DeMond Extension Home Economist Fellowship (Professional Development Scholarship)

Irma L. Manning Endowment Fund (program funds and scholarship for Extension educators to reach low-income youth and families)

Mariee C. Wallace Endowment Fund / Leadership Development & Citizen Engagement (to create leadership opportunities)

Grace Spivey Scholarship Fund (Study tours, Scholarship, Speaker Honorarium)

Lucille A. Clark Scholarship Fund (scholarship, program development and evaluation around housing issues in Oklahoma)

Margaret Edsel Fitch Fellowship Program Fund (Cultural competencies, reach diverse audiences)

I/We would like to establish my/our own endowed fund (minimum to endow is \$25,000):

Suggested name of the fund:

Purpose of the fund*: (check all that apply)

Scholarships: ___ FCS Extension Personnel ___ Students (FACS-ED; or other)

Faculty Support: ___ Deanship (\$5M) ___ Distinguished Chair (\$1M) ___ Chair (\$500K)

 ___ Professorship (\$250K) ___ Lectureship (\$100K)

Program Support: ___ FCS Extension ___ Other:

Facility Support: ___ Extension-FCS ___ Human Sciences

Other purpose: (explain)

**An OSU Foundation Representative will contact you to ensure your intentions are correctly represented on this form.*

Donor Name: _____ Signature: _____ Date: _____

Donor Name: _____ Signature: _____ Date: _____

OSU Foundation representative Name: _____ Signature: _____