



Gift PLANNING

Deferred Gift Information Sheet

Name: _____ Spouse Name: _____
 Class/Degree: _____ Class/Degree: _____
 Date of Birth: _____ Date of Birth: _____
 Address: _____

I/We are pleased to inform you of a gift to benefit UNC Medicine at The University of North Carolina at Chapel Hill:

Type of Gift

Value of UNC's Share

* Gift by Will

- Outright bequest \$ _____
 - Contingent bequest \$ _____
 - Residual bequest - _____% of my estate \$ _____

* Retirement Plan Assets

\$ _____

* Charitable Remainder Trust ¹

\$ _____

Irrevocable Revocable

* Life Insurance Policy

\$ _____

Owner/Beneficiary Beneficiary Only

* Other _____ \$ _____

¹ Remainder to Carolina is either *irrevocable*, meaning it is vested and cannot be revoked, or it is *revocable*, meaning you've retained the right to amend or change Carolina's interest.

Designated Purpose

Unrestricted (*general academic purposes*)

 Restricted, to be used as follows: _____

Acknowledgment

It is our policy to inform the Dean of the School of Medicine and the Chancellor of the University of your generous commitment. If it qualifies, your gift will also be listed in Carolina First campaign information. If you wish to limit acknowledgement from the policy mentioned above, check a box below.

- Please notify the Dean and the Chancellor and the benefiting department but no external listing.
- Please *do not* notify the Dean or the Chancellor or the benefiting department and no internal or external listings.

The Medical Foundation would greatly appreciate a copy of your will, trust agreement, or other planning document (or applicable excerpt). This allows us to review the language to insure that your wishes can be carried out as you intend.

Signature

Date



Carolina First—How your gift counts in the Campaign.

Bequests: Documented bequests will be counted during the Campaign. We will count the value of the amount included in the will if it is specific or a conservative estimate of the University's probable gift if it is based on a percentage of the estate. Retirement plan assets will also count as a bequest. Contingent bequests will not count in the Campaign.

Charitable Remainder Trusts: Charitable remainder trusts will be credited at the face value of the gift at the time it is made provided the remainder designation to Carolina is irrevocable. Revocable charitable remainder trusts (those which allow revocation or modification of the charitable beneficiary) will be counted as a special gift type that will count in the campaign.

Charitable Gift Annuities and Pooled Income Fund: Charitable gift annuities and gifts to the UNC-CH Pooled Income Fund will be credited at the face value of the gift at the time it is made.

Life Insurance: In order for a life insurance policy to be counted as a gift, the University (or one of its affiliated foundations) must be the owner and beneficiary of the policy. Gifts of life insurance will be credited at the cash value of the insurance policy at the time it is given. Annual premium payments will also be credited.

If the death benefit is realized during the campaign, it (less previously credited premiums and cash benefit) will be counted in the campaign. If the University is not the owner, the entire death benefit will be counted.