



Statement of Bequest Provision

for the **Florida Museum of Natural History**

Your generous bequest will provide important resources for future generations!

- CONFIDENTIAL -

This documentation will provide a basis for credit given for your proposed gift and recognition in the Florida Museum of Natural History Legacy Society.

Name _____

Spouse's name _____

Mailing address _____

City _____ State _____ ZIP _____

Telephone _____

Date of birth (mm/dd/yyyy) _____ Spouse's date of birth (mm/dd/yyyy) _____

TYPE OF PROVISION

I have included a specific or residual provision for the Florida Museum of Natural History 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: _____
Florida Museum of Natural History'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.

PURPOSE OF GIFT

- Gifts may be unrestricted for the Florida Museum of Natural History.
- Gifts may be restricted for a graduate fellowship, undergraduate scholarship, faculty support, research, program support or for the purchase of a building or equipment.
- Please discuss any specific restrictions with the Florida Museum of Natural History Development Office so we can ensure the best possible use of your gift.

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

SAMPLE WORDING FOR ESTATE GIFTS

Sample wording of a typical bequest to the Florida Museum of Natural History:

I give and devise to the Florida Museum of Natural History, located in Gainesville, Florida, my entire residuary estate (or _____ percent of my residuary estate, or _____ dollars, or a specific item) to support teaching, research and public programs. It is my specific wish that the University of Florida Foundation, Inc. apply for any matching funds that may be available as a result of this gift.*

It is helpful for the University of Florida Foundation, Inc. to have in its confidential files a copy of the excerpts from your estate documents that pertain to your charitable gift provision.

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

GIFT RECOGNITION

- I wish that my bequest to the Florida Museum of Natural History remain anonymous.
(The UF Foundation and the university will respect your request and keep your bequest information anonymous and withhold your name from the Florida Museum of Natural History Legacy Society and the university's Bequest Society Honor Roll.)
- I would like my bequest to be recognized in the Florida Museum of Natural History Legacy Society and the Bequest Society Honor Roll under the following name(s). *(Please print.)*

Signature

Date (mm/dd/yyyy)