

In support of the University of Missouri-Kansas City, we have completed a planned gift naming the UMKC Foundation as a beneficiary or recipient. The fulfillment of my/our commitment to the UMKC Foundation, to be used for the benefit of the University of Missouri-Kansas City, shall be made as follows:

## Personal Information

Please share your personal information so that we may recognize you and provide stewardship for your gift.

Name \_\_\_\_\_ Birthdate \_\_\_\_\_  
 Name \_\_\_\_\_ Birthdate \_\_\_\_\_  
 Address \_\_\_\_\_ City/State/Zip \_\_\_\_\_  
 Email \_\_\_\_\_ Telephone (\_\_\_\_) \_\_\_\_\_

## Type of Instrument

Please check or complete all applicable boxes.

My/Our gift provision is to be made through the following:

- Bequest (will or living trust agreement)\*
- Life Insurance
  - UMKC Foundation named as policy owner
  - UMKC Foundation named as beneficiary only
- Retirement Plan (i.e. IRA, 401(k))
  - UMKC Foundation named as account owner
  - UMKC Foundation named as beneficiary only
- Charitable Gift Annuity
- Irrevocable Trust (i.e. charitable remainder trust)
- Other: \_\_\_\_\_

\* Optional: You may wish to attach a copy of the document's first page, signature page and the page including the testamentary gift provision to UMKC Foundation.

## Valuation of Gift

Please check or complete all applicable boxes.

The estimated current value of my/our estate gift intention to the UMKC Foundation is \$ \_\_\_\_\_.

The estimated value of my/our estate gift intention to the UMKC Foundation is based on the following:

- Specific amount bequest \$ \_\_\_\_\_
- Percentage bequest % \_\_\_\_\_
- Residual or remainder bequest % \_\_\_\_\_
- Contingent bequest \$ or % \_\_\_\_\_
- Face value of policy or plan \$ \_\_\_\_\_
- Cash value of policy or plan \$ \_\_\_\_\_
- Full value of trust or annuity \$ \_\_\_\_\_

Name \_\_\_\_\_

Name \_\_\_\_\_

### Gift Purpose

My/Our gift may be used for the “unrestricted” purposes as determined by the UMKC Foundation to achieve the University of Missouri-Kansas City’s highest priority educational goals.

My/Our gift is designated for the following purpose(s):

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

I/We wish for the UMKC Foundation to create an endowment agreement to specify the purposes and terms of my/our gift provision.

### Donor Acknowledgement

**YES**, you may include my/our name in any donor listings.

**YES**, you may share pertinent details of my gift provision in UMKC and UMKC Foundation publications and websites.

**YES**, to help perpetuate Robert H. Flarsheim’s vision of a strong and secure future for UMKC, I/we accept the invitation to join the Robert H. Flarsheim Society, which recognizes individuals who have made provisions for a planned gift to UMKC and/or the UMKC Foundation.

My/Our name(s) should be included in the Robert H. Flarsheim Society publications and other recognition displays as follows:

\_\_\_\_\_  
Name

\_\_\_\_\_  
Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

Thank you for helping us plan for our future.