

In support of the University of Missouri-Kansas City, I/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** For recognition and stewardship of your gift.

Name \_\_\_\_\_ Birthdate \_\_\_\_\_

Name \_\_\_\_\_ Birthdate \_\_\_\_\_

Address \_\_\_\_\_ City/State/Zip \_\_\_\_\_

Email \_\_\_\_\_ Telephone ( \_\_\_\_ ) \_\_\_\_\_

**TYPE OF INSTRUMENT** Please check or complete all applicable fields.

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: Please attach a copy of the document's first page, signature page and the testamentary gift provision page to the UMKC Foundation.

**VALUATION OF GIFT** Please check or complete all applicable fields.

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 \$ \_\_\_\_\_

## GIFT PURPOSE

My/Our gift may be used for “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):

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I/We wish for the UMKC Foundation to create an endowment agreement to specify the purposes and terms of my/our gift provision. A minimum of \$25,000 is required to create an endowed fund.

## DONOR ACKNOWLEDGEMENT

**YES**, to help perpetuate Robert H. Flarsheim’s vision of a strong and secure future for UMKC, I/we would like my/our name(s) to be listed as part of UMKC’s 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 displayed as follows:

\_\_\_\_\_  
Name

\_\_\_\_\_  
Name

\_\_\_\_\_  
Donor Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Donor Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name

**THANK YOU FOR HELPING US PLAN FOR OUR FUTURE!**