

### Planned Gift Confirmation

*Friends of the North Carolina School of Science and Math Foundation who remember this institution through gifts from their will, charitable remainder trust and/or retirement plan strengthen the school's foundation and set the course for its future. They are linked to a long line of benefactors who have made such gifts since the Foundation's inception, and their philanthropy is recognized by membership in the Legacy Circle.*

Name: \_\_\_\_\_ Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_

Spouse/Partner: \_\_\_\_\_ Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_

Mailing Address: \_\_\_\_\_

Telephone: (home) \_\_\_\_\_ (mobile) \_\_\_\_\_ (work) \_\_\_\_\_

E-mail: \_\_\_\_\_

**Please confirm that you have:**

- Included the NCSSM Foundation in your estate plan:     Will     Trust     Transfer on Death account
  - Specific dollar amount: \$ \_\_\_\_\_
  - Percentage: \_\_\_\_\_% Approximate amount of your gift based on today's value: \$ \_\_\_\_\_
  - Specific Asset: \_\_\_\_\_
  - Gift from residuary of estate: \_\_\_\_\_% Approximate gift based on today's value: \$ \_\_\_\_\_

- Included the NCSSM Foundation as the beneficiary of (check all that apply):
  - IRA, pension or other retirement account
  - Charitable Remainder Trust    This trust is managed by: \_\_\_\_\_
  - Other (please specify): \_\_\_\_\_
  - Approximate amount of your gift based on today's value: \$ \_\_\_\_\_

**Designation of Gift:**

- Unrestricted
- Restricted to following purpose: \_\_\_\_\_
- General endowment
- Endowed Fund in the name of \_\_\_\_\_, to be used for \_\_\_\_\_

**Please enroll me/us in the Legacy Circle:**

I /  We grant permission to publish my/our name(s) in NCSSM Foundation recognition materials. Please use the following name(s) in any such listing: \_\_\_\_\_

I /  We do not want my/our name(s) published in NCSSM Foundation recognition materials.

Attorney of Financial Advisor who assisted me/us in this gift: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

Spouse/Partner Signature: \_\_\_\_\_ Date: \_\_\_\_/\_\_\_\_/\_\_\_\_