

Wake Forest alumni, parents and friends have shown their commitment to the University through their gifts of time, talent and treasure. We are grateful for the many ways that Wake Foresters are helping us secure a bright future for this place we love.

In addition to the impact you can have on Wake Forest by making gifts during your lifetime, you have the opportunity to leave a legacy for future generations through a bequest provision. From Wake Forest's very beginning, bequests have always been critical to the fiscal welfare of the University. Many alumni and friends have chosen this personal way of being permanently identified with our most worthy and enduring enterprise.

We hope that when you make Wake Forest a part of your estate plan, you will share this information with us. We thank you for your commitment and would like to keep a record of your gift. In order to ensure that our records are accurate and up-to-date, please complete the **Confidential Statement of Planned Gift Provision** on the reverse side of this document. Once you have signed and completed the document, please return it to:

The Office of Gift Planning  
P. O. Box 7227  
Winston-Salem, North Carolina 27109

If you have questions about your bequest or wish to discuss charitable estate planning in greater detail, please contact **Shaida Jarrahi Horner (JD '99), CPA, Associate Vice President for Gift Planning** at 336.758.4696 or [hornersj@wfu.edu](mailto:hornersj@wfu.edu).

All estate gifts are acknowledged by including each donor's name in our annual Legacy Society Honor Roll and in various Wake Forest publications. If you would prefer to remain anonymous, please notify us and we will not publish your name.

We thank you for your thoughtful planning and generous contribution to the future of Wake Forest.



Confidential Statement of Planned Gift Provision

# Confidential Statement Of Planned Gift Provision

Name(s): \_\_\_\_\_  
Mailing Address: \_\_\_\_\_  
Email Address: \_\_\_\_\_  
Wake Forest Class Year: \_\_\_\_\_  
Relationship to University (if non-alumni): \_\_\_\_\_

(Please read the information on the reverse side before completing this section.)

| Type of Provision   | WFU Federal Tax Id #56-0532138 | Gift Amount |
|---|--------------------------------|-------------|
| I have made provision for Wake Forest University in my estate plan as follows:  |                                |             |
| <input type="checkbox"/> Outright bequest in my Will.   |                                | \$ _____    |
| <input type="checkbox"/> Provision in my Will of _____% of the rest and remainder of my estate.<br>I estimate the present value for Wake Forest University to be:       |                                | \$ _____    |
| <input type="checkbox"/> Provision in the Will of the survivor of my spouse and myself<br>(spouse's date of birth): _____   |                                | \$ _____    |
| <input type="checkbox"/> Trust with Wake Forest as a final beneficiary (please include<br>ages of income beneficiaries or describe other conditions):<br>_____<br>_____ |                                | \$ _____    |
| <input type="checkbox"/> Beneficiary of my <input type="checkbox"/> IRA, <input type="checkbox"/> Life Insurance, or <input type="checkbox"/> Retirement Plan           |                                |             |
| <input type="checkbox"/> Dollar Amount:   |                                | \$ _____    |
| <input type="checkbox"/> Percentage: _____%   |                                |             |
| I estimate the present value for Wake Forest University to be:  |                                | \$ _____    |
| <input type="checkbox"/> Other/Comments: _____<br>_____   |                                |             |
| If this provision is restricted to a specific area/fund of the University, please indicate:<br>_____<br>_____   |                                |             |

THIS IS NOT A BINDING LEGAL DOCUMENT. Your signature simply verifies that you believe this information is correct as of the date you signed this form. Wake Forest University recognizes the value of a future gift, as well as the provision creating the gift, may change over time. If possible, please consider notifying us of future changes in your charitable plans for Wake Forest University.

|                        |   |
|------------------------|---|
| _____<br>Date          | _____<br>Your Signature   |
| _____<br>Date of Birth | _____<br>Joint Signature, if applicable, along with date of birth |