



**UNC GREENSBORO**

PLANNED GIVING BRIEF

# DOCUMENTING YOUR GIFT

## Why You Should Document Your Planned Gift

Alumni and friends of UNC Greensboro regularly share with us that they have included the University in their estate plans. Many provide details about their intentions, in effect “documenting” their future gifts that will benefit the University. There are many reasons why you should consider documenting your intentions with UNC Greensboro.

### **Your Wish**

Documenting your intentions will help ensure your wishes are met. With respect to designating a specific purpose or establishing an endowment, we will review or provide specific language. It also allows us to keep you apprised of new programs or developments that may impact your charitable intention.

### **Designating a Purpose**

If you have not yet designated a purpose, simply complete a Letter of Intention to present your wishes. We will confidentially keep copies of your bequest documents in our records for future reference.

### **Inspire Others**

Testamentary gifts are a vital source of continuing financial support for the University. Your gift will inspire other alumni and friends to follow in your footsteps.

### **Appreciation**

Documenting your intentions will allow us to recognize you now for your future gift. Upon sharing your bequest intention, you will be enrolled as a member of The Unbroken Band Society.

### **No Obligation**

By documenting your intentions, you are in no way entering into a legally binding agreement. Documenting your gift is merely an expression of your current intent. You retain the flexibility to change your plans should your circumstances or priorities change.

To learn more about documenting your planned gift, please contact your Development Officer or our Office of Planned Giving. We look forward to helping you fulfill your financial planning goals while supporting UNC Greensboro.

UNC Greensboro | Office of Planned Giving

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Tel. 336.256.1277 | email: [giftplan@uncg.edu](mailto:giftplan@uncg.edu) | website: [giftplanning.uncg.edu](http://giftplanning.uncg.edu)



## The Importance of Participation

Why is your support of the University so important? Giving by alumni helps ensure the continued excellence of the UNC Greensboro experience. Plus, participation indicates alumni satisfaction and sends a message to the world about the quality of a UNC Greensboro degree and our alumni success. A charitable gift is an ongoing “vote of support” for UNC Greensboro and the value of your degree. Alumni participation impacts:

- National rankings. External evaluators like *U.S. News and World Report* and *Princeton Review* use participation rates when calculating rankings.
- Value of a UNC Greensboro degree. Parents and prospective students look at national rankings and alumni participation rates as indications of how satisfied alumni are with the school and the quality of the degree.
- Financial strength. Annual giving is an essential resource for the University. Corporations and foundations also require alumni participation rates in proposal requests because they believe their philanthropic or sponsored-research dollars should go to an institution with proven results. Alumni satisfaction is a key measure.

## How To Document Your Bequest

To document your bequest, we request the following items be sent to the Office of Planned Giving: Completed Planned Gift Letter of Intent form. We also request (though it’s not required) a copy of one of the following documents:

- Relevant portion of your will or trust document referencing the University
- Relevant portion of your retirement account beneficiary designation form with available pertinent plan information (plan type, name of account owner, plan administrator, date)

Please contact us for specific bequest or endowment language. Our standard bequest language may also be found on our website.

Documenting your bequest intention solidifies your commitment to UNC Greensboro and allows the University to plan for our bright future. Thank you for your support.

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