

**NOTIFICATION OF ESTATE GIFT INTENTION**

It is my/our desire to inform The Upstate Foundation, Inc. that a provision in my/our estate and/or financial plans has been made for the future benefit of Upstate.

Name \_\_\_\_\_ Date of Birth \_\_\_\_\_

Spouse name (if applicable) \_\_\_\_\_ Date of Birth \_\_\_\_\_

Address \_\_\_\_\_

**Type of gift**

Will/Living trust     Retirement plan beneficiary\*     Life Insurance beneficiary\*

Financial account\*     Charitable trust

\*Name of company/Financial institution/IRA custodian \_\_\_\_\_

**Gift options**

Please select your gift option for The Upstate Foundation, Inc.

Percentage of estate     Specific dollar amount     Specific asset(s) property

As of today's date, I/we estimate the value of this gift to be \_\_\_\_\_

**Purpose of gift**

This is an unrestricted gift.

This gift is to be used for the following purpose (list fund/endowment name):

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

Please recognize my/our Legacy Society status:  Effective this year     In Memoriam

How you want your name(s) to appear in Upstate Foundation publications:

\_\_\_\_\_

The values of deferred gifts as well as the provision themselves may change over time. My/our signatures verify only that the above information is accurate as of this date and does not represent a legal or binding commitment to The Upstate Foundation.

Signature \_\_\_\_\_ Date \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

*Thank you for your generous and vital support!*

Development Officer Signature \_\_\_\_\_ Date \_\_\_\_\_