

## PLANNED GIFT TRANSMITTAL FORM

### DONOR INFORMATION

HARD CREDIT	ADDRESS	PHONE NUMBER
NAME:	(H) :	(H) :
UID:	(W) :	(W) :
SOFT CREDIT	ADDRESS	PHONE NUMBER
NAME:	(H) :	(H) :
UID:	(W) :	(W) :
OTHER CONTACT	ADDRESS	PHONE NUMBER
<input type="checkbox"/> Financial Manager/Attorney	(H) :	(H) :
<input type="checkbox"/> Beneficiary Relationship to donor::	(W) :	(W) :
NAME / FIRM:		
UID:		

**ANONYMOUS**  
(Donor's name will not be published or publicly recognized)

### GIFT INFORMATION

Revocable     Irrevocable

Testamentary Commitment   
 Bequest-Stocks/securities   
 Bequest-Cash   
 Bequest-Property   
 Annuity Trust   
 Charitable Remainder Trust  
 Charitable Gift Annuity   
 Charitable Lead Trust   
 Life Estate   
 Insurance Premium   
 Retirement Plan

Amount	Solicitation Method	Solicitor Name/UID	Amount of Solicitor Credit	Purpose / Designation	Designation (Fund) Number

**Documentation (required):**

Statement of Intent is attached                       Yes     No  
Will or other documentation is attached            Yes     No  
Proposal to Manage Constituent submitted?       Yes     No  
Solicitation Contact Report(s) submitted?        Yes     No

Comments/Details:

**Quid Pro Quo Information:**

Were any goods or benefits given in exchange for this gift?     Yes     No    If yes, explain:

### DEPARTMENT/DIVISION INFORMATION

PREPARED BY	TELEPHONE NUMBER	DATE PREPARED	COLUMNS SOCIETY MEMBER? <input type="checkbox"/> Yes <input type="checkbox"/> No
COMMENTS OR ADDITIONAL INFORMATION ON DONOR / GIFT.			