



Confirmation of Your Legacy Gift



This form is to help you provide information about your deferred gift to Family House to ensure that it will be used in accordance with your wishes. Please note that this document is not legally binding and if the information contained here is contradicted by your estate planning or gift document, the terms of the estate planning or gift document will govern.

SECU Family House at UNC Hospitals Tax Identification Number is # **91-2108125**

Name(s): _____

Address: _____

Date(s) of Birth: _____

Email address: _____ Phone: _____

Please describe your deferred gift (or attach a copy of documentation, if you prefer):

☐ Will ☐ Revocable "Living" Trust ☐ Retirement Account ☐ Other: _____

By including us in your estate plan you will become a member of The Legacy Family. Do you wish to remain anonymous?

☐ Yes ☐ No * please note that if the answer here is inconsistent with your estate planning or gift document, the estate planning or gift document will govern

Please provide an estimate of the current value of your deferred gift to Family House. All such information will be kept confidential. This estimate does not bind you or your estate in any way. Estimate: _____

Note where the proceeds of your planned gift should be placed:

* please note that unrestricted gifts allow Family House the flexibility to apply your gift how we currently need it most

☐ Legacy Endowment ☐ Unrestricted Fund

☐ Split between funds in this manner: _____% Legacy Endowment _____% Unrestricted Fund

Who would you like to receive reports on Family House and its progress after the planned gift is executed?

(Name, Address, and Phone Number of person to receive reports)

Donor's Signature

Co-Donor's Signature

Date

This document does not bind you or your estate. By signing this form, you are simply acknowledging your current plans to benefit Family House in the future and giving us guidance as to your wishes.

Please mail this form to: Martha G. Aldridge, Director of Strategic Initiatives at SECU Family House at UNC Hospitals
123 Old Mason Farm Road, Chapel Hill, NC 27514

Please direct questions to: Martha G. Aldridge, Director of Strategic Initiatives at 919-932-8003 or martha@secufh.org