

**CONFIRMATION OF YOUR LEGACY GIFT**

This form is to help you provide information about your deferred gift to the Nicholas School of the Environment or the Duke University Marine Lab. By sharing this information, you can help ensure that your gift will be used in accordance with your wishes.

*Thank you for your thoughtful investment in the future of this special place.*

Name(s): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Class(es): \_\_\_\_\_\_\_\_\_\_\_\_\_

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date(s) of Birth: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

 ☐ Will ☐ Revocable “Living” Trust ☐ Retirement Account ☐ Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

How would you like the Nicholas School to use your gift? (e.g., endowment, research, etc.)

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

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

Estimate: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Heritage Society:** Your deferred gift entitles you to become a member of the Duke University Heritage Society and have your name listed with other alumni and friends who have established a similar gift for Duke. You will also be invited to Heritage Society events.

☐ Yes, I would like to be enrolled in the Duke University Heritage Society.

☐ No, please do not include me in the Duke University Heritage Society.

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Signature Signature Date

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

**Please mail this form and direct any questions to:**

Duke University Office of Gift Planning Phone (919) 613-8001

Box 90600 Email Catherine.cross@duke.edu

Durham, NC 27708 [giving.duke.edu/gift-planning](https://giving.duke.edu/gift-planning/)