

# Confirmation of Your Legacy Gift

This form is to help you provide information about your legacy gift to Duke University. By sharing this information, you can help ensure that your gift will be used in accordance with your wishes. If this is a joint gift, please complete the spouse/partner fields and signature. **\*Required fields**

(If applicable)

\*Name: \_\_\_\_\_ Spouse/Partner: \_\_\_\_\_

\*Date of Birth: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

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

\*Email Address: \_\_\_\_\_ Email Address: \_\_\_\_\_

Duke Class: \_\_\_\_\_ Duke Class: \_\_\_\_\_

\*Please describe your legacy gift. Select one of the following options:

Will  Revocable "Living" Trust  Retirement Account  Other: \_\_\_\_\_

\*How would you like Duke University to use your gift (for example, unrestricted use, financial aid, or a specific area or purpose)?

\_\_\_\_\_

Please provide an estimate of the current value of your legacy 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 legacy gift entitles you to become a member of the Duke Heritage Society and have your name(s) listed with other society members. You will receive a Duke Heritage Society lapel pin and certificate, will be invited to special events, and can elect to receive our quarterly Duke Blueprints e-newsletter.

\*Select one of the following options:

- Yes, I/we would like to be listed as a member of the Duke Heritage Society.
- Yes, I/we would like to be a member of the Duke Heritage Society but list my/our gift as "Anonymous."
- No, please do not include me/us in the Duke Heritage Society.

\*Signature: \_\_\_\_\_ \*Date: \_\_\_\_\_

Spouse/Partner: \_\_\_\_\_ 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.

Upon submission, a copy of this form will be emailed to you for signature confirmation. Please confirm your signature in order to submit the completed form to the Duke Office of Gift Planning.

Questions? Contact the Office of Gift Planning: (919) 681-0464 | [giftplanning@duke.edu](mailto:giftplanning@duke.edu) | [giving.duke.edu](http://giving.duke.edu)