

Other Gifts

● Planned Gifts

- Pertinent documentation should be obtained from the donor prior to valuing the planned gift.
- Gift Accounting will not record the planned gift without written donor confirmation.
- This process requires the individual valuing the planned gift to use source documentation.
- Secondary verification of the gift valuation also must be implemented.
- The Director of Planned Giving will assist the Development Officer and initially value the gift using University Relation's Crescendo Planned Giving software (or the planned giving software in use at any given time).
- This valuation and supporting source documentation is then given to the Director of Development Information Services who will verify the calculation's accuracy and the accompanying documentation.



Other Gifts

- **Planned Gift Documentation Form**

- On the DIS Web page under “Procedures/Manuals”
- Still need to try and obtain legal documents from the donor
- No entry into Banner unless this form is completed or other acceptable documentation is received and approved by:
 - Director of Planned Giving
 - Director of Development Information Services



Sample Planned Gift Documentation Form (page 1)



University Relations Planned Giving Department

John Dodge House
Rochester, Michigan 48309-4497
(248) 364-6129 Fax: (248) 364-6141

GIFT PLANNING

This documentation will provide a basis for recognition given to you for your gift through membership in the Heritage Society, recognizing those who contribute documented planned gifts to Oakland University to ensure its future. Please complete and return to:

Oakland University, Department of Planned Giving, John Dodge House, Rochester, MI 48309.

Name _____

Address _____

City _____

State _____

Zip _____

Telephone _____

Birthdate (mm/dd/yyyy) _____

Professional advisors (Attorney, CPA, Trust Officer) _____

Email: _____

TYPE OF PROVISION

I have made provisions for Oakland University in my estate planning through one or more of the following gift vehicles:

- | | |
|--|----------|
| a. Percentage or residue of estate; estimate of present value | \$ _____ |
| b. Outright bequest in my will | \$ _____ |
| c. Outright bequest in my spouse's will | \$ _____ |
| d. Bequest in my will if my spouse or other heir predeceases me | \$ _____ |
| e. Bequest in my spouse's will if I predecease my spouse | \$ _____ |
| f. Life insurance policy | \$ _____ |
| g. Retirement fund assets | \$ _____ |
| h. Revocable <input type="checkbox"/> Irrevocable <input type="checkbox"/> | \$ _____ |
| i. Trust arrangement with Oakland University as final beneficiary | \$ _____ |

*(Please include ages and gender of any other beneficiaries or
or describe other conditions.)*



Sample Planned Gift Documentation Form (page 2)

PURPOSE

(Please indicate how you would like your gift to be used.)

\$_____ or _____% unrestricted for the greatest needs of Oakland University, as determined by the President.

\$_____ or _____% for the specific purposes of _____

It is helpful for the university to have in its confidential files a copy of your will, trust agreement or other document, or the applicable excerpts therefrom, pertaining to your provision.

May we have permission to contact your attorney or trustee for additional information that may be needed for our records? _____Yes _____No

No information about your gift will be released without your prior approval.

From time to time, Oakland University will list donors who are members of the Heritage Society in various publications. By so doing, others are encouraged to think about the possibilities in their circumstances to make provisions for the university in their estate.

May we have your permission to list your name in our list of Heritage Society members?
_____Yes _____No

(Name as you wish to be recognized as a Heritage Society member.)

I will notify Oakland University if I choose to modify the intent of this bequest.

Signature _____ Date _____

Thank you in advance for your thoughtful gift to Oakland University

Director of Planned Giving Date _____

Director of Development Information Services Date _____

