



Planned Gift Notification / 2020 Charter Member Enrollment Form

To recognize your bequest to the Osher Lifelong Learning Institute at the University of Arizona (OLLI-UA), we simply need written notice of your intention. Your information is kept confidential and we will only recognize your legacy gift with your approval.

DONOR INFORMATION

Name(s): _____

Address: _____

City: _____ State: _____ Zip: _____

Telephone Contact Number(s): _____ Email: _____

OLLI-UA LEGACY SOCIETY INFORMATION

OLLI-UA is pleased to recognize you as a charter member of the OLLI-UA Legacy Society in general reporting, newsletters, on your nametag and more. Please indicate your recognition preference by checking one of the following:

☐ Please list my/ our recognition name(s) as (If different from above): _____

☐ I/We wish to be anonymous – do not share my information.

GIFT INFORMATION: OLLI-UA is named as a beneficiary of (check all boxes that apply):

☐ Bequest in will

☐ Beneficiary of life insurance policy

☐ Provision in living Trust

☐ Payable on death (POD) Designation Bank Account, savings, CD, etc.

☐ Beneficiary of retirement account - traditional IRA, 401(k), 403(b)

☐ Other: _____

☐ Charitable Gift Annuity

Contact Information of any organization(s), Personal Representative(s), and or Successor Trustees who may contact us upon your demise regarding the bequest(s) above. Need more room? Feel free to add additional attachments.

Name / Organization: _____

Address: _____

City: _____ State: _____ Zip: _____

Telephone Contact Number(s): _____ Email: _____

Any Additional Notes: _____

Legacy Society Member Signature 1*: _____ **Date:** _____

Legacy Society Member Signature 2* (if applicable): _____

*By signing you affirm that all arrangements for the gift(s) above have been completed. This form is non-binding and does not constitute a legal promise of any future donation to OLLI-UA. We understand that most gift are revocable and that your estate plans may change.



Instructions:

Ensure all gift arrangements have been finalized, then complete the first page, print, sign and return it with any optional supporting documents to:

Program Manager, OLLI-UA, 1955 E. 6th Street, Tucson AZ 85721, Phone: 520-626-9039

Or, you may submit the completed form and any supporting documents as attachments via email to: ollimail@email.arizona.edu

OLLI-UA is a 501(c)(3) non-profit organization

Designate Gifts to:

Osher Lifelong Learning Institute at the University of Arizona

IRS Tax ID: 33-1096431 Address: 1955 E. 6th Street, Tucson AZ 85721, Phone: 520-626-9039

Need Help?

For advice, assistance or specific questions, we have OLLI-UA member Planned Giving “Coaches” ready to assist. Prospective donors are encouraged to meet with a Planned Giving “Coach” at any point in the process. They can help explain donation choices and strategies, provide wording for amendments and codicils and help you with forms, including enrollment as Charter Members of the OLLI-UA Legacy Society.

Please contact the OLLI-UA Program Manager by phone at 520-626-9039 or email ollimail@email.arizona.edu and we will put you in contact with a fellow OLLI-UA member Planned Giving “Coach” on your campus.

We can’t provide tax or legal advice, but we can answer many questions relating to various types of planned gifts and which type might work best for you.