



## Estate Provision Form

For the purposes of documenting my/our charitable gift I/we have herein completed this form to document my/ our actions and intent. It is understood that this form's purpose is to document the value of my/our gift to Otterbein University and its designation at that time. The value of the gift is a conservative estimate of my/our gift. It is understood that this is an estimate and does not in any way guarantee a specific amount to Otterbein University.

My/Our gift has been included in my/our:

Bequest

Gift of Real Estate with a Retained Life

Charitable Remainder Trust

Other:

Annuity Trust

Unitrust

I/We conservatively estimate the value of my/our gift to be

Of \$ ; and/or

For % of my/our gift vehicle of today's date. The estimated market value is: \$

I /We have designated my/our gift to be used in support of

The University endowment (unrestricted); or

The following special program , of which a gift agreement is filed/will be filed within the Otterbein Office of Institutional Advancement.

The following special program , of which a gift agreement is not warranted.

Executor Name:

Relationship to You:

Executor Address:

Phone:

My spouse has a reciprocal estate plan

I/We hereby **give** our permission

**do not give** our permission

to Otterbein University to publish my/our gift in media or University Publications. A copy of the first page of my/our estate document and the page that names Otterbein as beneficiary and the signature page are attached. Should I/We ever change any aspect of our gift to Otterbein University I/We or My/Our legal representative will inform the Division of Advancement at Otterbein University of the changes made.

For the purposes of documenting my gift to Otterbein University I hereby sign this document.

Donor (I authorize Otterbein to use the following as my official signature)

Date

Donor (I authorize Otterbein to use the following as my official signature)

Date