



Giving higher education to generations.
THE UNITED METHODIST HIGHER EDUCATION FOUNDATION

PLANNED GIVING STATEMENT OF INTENT

This statement is an expression of my intent to provide for the future of the United Methodist Higher Education Foundation (UMHEF) through a planned or estate gift. The provision(s) made include the following:

- ☐ An outright bequest in my will upon the passing of the donor, or the passing of the donor and spouse.
- ☐ A life insurance policy, in which UMHEF is named as beneficiary or owner and beneficiary.
- ☐ Retirement assets, in which UMHEF is named as a beneficiary.
- ☐ Other (please specify)

Though it is not necessary to provide, this information may help our Board of Trustees make determinations regarding UMHEF's financial future.

The estimated value of my (our) gift is \$_____.

Purpose

It is my wish that the gift be used:

- ☐ As an unrestricted gift to UMHEF (applied to area of greatest need)
- ☐ Restricted to this established endowment: _____
- ☐ Restricted to a new endowment upon receipt of funds

Signature of Donor

Date

Name: _____

Address: _____

Email: _____

Phone: _____

Please know that this form is used for record-keeping purposes and for inclusion in the Wesleyan Heritage Society. It is not a legal document and in no way restricts your ability to change your plans at any time. The details of your bequest will remain confidential.