

CONFIDENTIAL STATEMENT OF BEQUEST PROVISION

Name: _____ Phone: (h) _____

Preferred Address: _____ (o) _____

_____ E-mail: _____

Vanderbilt degree or affiliation, if any: _____ Fax: _____

Date of birth (month/day/year): _____

TYPE OF PROVISION

ESTIMATED AMOUNT

I have made a provision for Vanderbilt in my estate planning as follows:

A. Outright bequest in my will of: \$ _____

B. Percentage of residue of estate ____%. Estimated present value of estate is \$ _____. Therefore, estimated value of bequest gift is: \$ _____

C. Bequest subject to the following conditions: _____
_____ \$ _____

D. Life insurance policy \$ _____

E. Testamentary trust arrangement with Vanderbilt the beneficiary (please include names and birthdates of beneficiaries & describe terms or conditions) _____
_____ \$ _____

F. Other (please describe) _____ \$ _____

PURPOSE (Please note that "Vanderbilt University, a Tennessee not-for-profit corporation" is the legal entity to be named in the will. Further specific designation must be detailed therein.)

Please indicate specific purpose below:

_____ Unrestricted to Vanderbilt University

_____ Unrestricted to the following VU school, college, division: _____

_____ Restricted for the specific purpose of: _____.

A copy of one's will, trust agreement or other documents or the applicable excerpts would be greatly appreciated.

(Date)

(Signature)