

UNIVERSITY OF TENNESSEE FOUNDATION, INC.
Central Planned Giving Posting Form

FOR POSTING gifts of EXPECTANCIES (BE, DF) and RETAINED LIFE ESTATES (RL) in ANDI

Form and instructions are located at: <https://capricorn.dii.utk.edu/alumni/asweb/userLogin2.aspx?URL=/alumni/asweb/policies.asp>

After completing, **Email To:** Amanda Cook (acook@utfi.org) & Amy Byrd (abyrd@utfi.org); FAX: 865-974-4250 or
Mail To: 1525 University Ave., Knoxville, TN 37921
CC: Central Planned Giving - Email: plannedgiving@tennessee.edu; FAX: (865) 974-8870 or Mail:
1610 University Ave, Ste. 202, Knoxville, TN 37921

Submitted by: _____ Today's Date: _____ Proposal #: _____

Donor: _____ ANDI ID#: _____ DOB: (if not in ANDI) _____

Spouse: _____ ANDI ID#: _____ DOB: (if not in ANDI) _____

Address: _____

Date of Expectancy: _____ Development Officer(s): _____

Gift Amount: \$ _____ Gift Agreement: On file In process Not needed

Expectancy Type: **(check one)**

(BE) Pledge/Bequest Expectancy – UTFI mentioned in: (choose type) will living trust

(DF) Deferred Non-Bequest – UTFI is beneficiary of: (choose type) a retirement plan
commercial life insurance policy/commercial annuity POD (bank account)
TOD (stocks/bonds) 3rd party CRT (revocable)

(RL) Retained Life Estate (appraisal from donor must be attached)

Gift Credit Split with Spouse? Yes No Gift is ANONYMOUS Gift is CONFIDENTIAL

Designation: Campus: _____ Institute: _____ College: _____ Department: _____ Other: _____

Multiple Areas: (list dollar amount/percentage for each area) _____

If gift will go into an already established endowment, fund, etc. list current name(s) and or account #:

TRY TO INCLUDE AS MUCH SUPPORTING DOCUMENTATION WITH YOUR SUBMISSION

(e.g. - page(s) from will, living trust, beneficiary form, etc.)

**** If you have no supporting documentation, all expectancies **must** have either: a gift agreement (required for new designations) or a Deferred Donor Statement of Intent form (used for existing designations).

Comments: _____

XC: OnBase, CPG Shared Drive, Campus/Inst. PG Officer