

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

FOR POSTING and COUNTING REALIZED BEQUESTS (BQ) IN ANDI

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

Realized Bequests require creating an "Estate of" record for the deceased in ANDI

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 #: _____

Deceased Donor: Estate of _____ Deceased ID#: _____ Estate ID# _____ New: _____

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

What type of estate gift did the proceeds come from? (check one):

Will Revocable Living Trust Retirement Plan Commercial Life Insurance
Commercial Annuity (non-qualified) POD TOD 3rd Party CRT Other: _____

Gift Amount: \$ _____

Gift Tender: Cash/Check Check Attached Securities Real Estate Other (see Comments)

Gift Agreement: On file In process Not needed

Designation of gift: [Provide Account Name(s) & Number(s) below]: UNKNOWN NEW

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

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

TRY TO INCLUDE AS MUCH SUPPORTING DOCUMENTATION WITH YOUR SUBMISSION

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

Comments: _____

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