

Gift Confirmation

Friends of Carnegie Mellon who remember the university through gifts from their will, trust, retirement plan, and/or life insurance policy strengthen the university's foundation and set the course for its future. They are linked to a long line of benefactors who have made such gifts since the university's inception, and their philanthropy is recognized by membership in the Warner Circle.

Name: _____ Date of Birth: ____ / ____ / ____

Name: _____ Date of Birth: ____ / ____ / ____

(if joint gift)

Mailing address: _____

Preferred E-mail: _____

Preferred Telephone: (home) _____ (mobile) _____

Please confirm that you have:

- Included Carnegie Mellon University in your estate plan: Will Trust Transfer on Death account
 - Specific dollar amount: \$ _____
 - Percentage: ____% Approximate amount of your gift based on today's value: \$ _____
 - Specific Asset: _____
 - Gift from residuary of estate: ____% Approximate gift based on today's value: \$ _____

- Included Carnegie Mellon University as the beneficiary of (check all that apply):

- Life Insurance Policy
- IRA, pension, or other retirement account
- Charitable Remainder Trust This trust is managed by: _____
- Other (please specify): _____
- Approximate amount of your gift based on today's value: \$ _____

Additional information you wish to share about your gift _____

Designation of Gift:

- Unrestricted (for CMU's current use)
- Designated for: _____
- General Endowment

Please enroll me/us in the Warner Circle:

- I / We grant permission to publish my/our name(s) in university recognition materials. Please use the following name(s) in any such listing: _____
- I / We do not want my/our name(s) published university recognition materials.

Attorney or financial advisor who assisted me/us in this gift: _____

Signature: _____ Date: ____ / ____ / ____

Spouse/Partner Signature: _____ Date: ____ / ____ / ____
(if joint gift)