

# Oklahoma City University

## Gold Star Society

Community, Creativity, Connectivity.

### Confirmation of your Planned Gifts

I/We, the undersigned, have included Oklahoma City University in our will, revocable living trust, or through other deferred giving, and of the following description of the gift within this form for the confidential use of University Advancement.

Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_  
Spouse Name (if applicable): \_\_\_\_\_ Date of Birth: \_\_\_\_\_  
Mailing Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_  
Phone Number: \_\_\_\_\_ (cell / home) Email: \_\_\_\_\_

### Description of Gift

\_\_\_\_\_  
\_\_\_\_\_

#### Type of Gift

#### Today's Value of OCU's Share

- Will ..... \$ \_\_\_\_\_
- Revocable Living Trust ..... \$ \_\_\_\_\_
- Life Insurance ..... \$ \_\_\_\_\_
- Retirement Plan ..... \$ \_\_\_\_\_
- Other: ..... \$ \_\_\_\_\_

I/We understand this is not a legal or binding commitment on my/our estate. OCU should understand that the size of this future gift may be significantly different from the amount estimated above. If for any reason in the future OCU is no longer in my/our plan, I/we will notify you so you can update your records.

- If OCU is an alternate beneficiary and will only receive the gift under certain contingencies, please check. If you checked this box, please describe the conditions under which OCU would receive this gift: This box should only be checked if OCU is truly an alternate beneficiary, for example, when all primary beneficiaries to your estate would have to be predeceased you. or forfeit any claims to your estate before OCU would receive any distribution from your estate.

### Purpose of Gift

- This is an unrestricted gift to Oklahoma City University
- This is an unrestricted gift to \_\_\_\_\_, Oklahoma City University, Oklahoma City, Oklahoma.  
(School or College)
- This gift is to be used for the following purpose or program: \_\_\_\_\_
- A copy of the relevant provision of my will, revocable living trust or beneficiary designation form is attached (or the relevant pages such as the title page, description of the gift page(s) and signature page).

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

#### Please return to:

University Advancement, Oklahoma City University

2501 North Blackwelder Avenue, Oklahoma City, OK 73106 – 405-208-7000 – [give@okcu.edu](mailto:give@okcu.edu) – [www.oculegacy.org](http://www.oculegacy.org)