



Estate Provision Form

For the purposes of documenting my/our charitable gift I/we have herein completed this form to document my/ our actions and intent. It is understood that this form's purpose is to document the value of my/our gift to Otterbein University and its designation at that time. The value of the gift is a conservative estimate of my/our gift. It is understood that this is an estimate and does not in any way guarantee a specific amount to Otterbein University.

My/Our gift has been included in my/our:

- | | |
|----------------------------|--|
| Bequest | Gift of Real Estate with a Retained Life |
| Charitable Remainder Trust | Other: |
| Annuity Trust | |
| Unitrust | |

I/We conservatively estimate the value of my/our gift to

Of \$ _____ ; and/or

For _____ % of my/our gift vehicle of today's date. The estimated market value is: \$ _____

I/We have designated my/our gift to be used in support of

The University endowment (unrestricted); or

The following special program _____, of which a gift agreement is filed/will be filed within the Otterbein Office of Institutional Advancement.

The following special program _____, of which a gift agreement is not warranted.

Executor Name:

Relationship to You:

Executor Address:

Phone:

My spouse has a reciprocal estate plan

I/We hereby **give** our permission

do not give our permission

to Otterbein University to publish my/our gift in media or University Publications. A copy of the first page of my/our estate document and the page that names Otterbein as beneficiary and the signature page are attached. Should I/We ever change any aspect of our gift to Otterbein University I/We or My/Our legal representative will inform the Division of Advancement at Otterbein University of the changes made.

For the purposes of documenting my gift to Otterbein University I hereby sign this document.

Donor Printed Name

Donor (I authorize Otterbein to use the following as my official signature)

Date

Donor Printed Name

Donor (I authorize Otterbein to use the following as my official signature)

Date