



CONFIRMATION OF YOUR PLANNED GIFT

When you make a new planned gift to Duke University and complete this form, 10% of your planned gift (up to \$10,000) will be matched as an unrestricted, current-use gift to your chosen area at Duke. This opportunity lasts until all matching funds have been allocated or until June 30, 2025, whichever comes first, and is limited to donors born before July 1, 1964. If this is a joint gift, please complete the spouse/partner fields. **Required fields*

*Name: _____ Spouse/Partner: _____

*Date of Birth: _____ Date of Birth: _____

*Address: _____

*Email Address: _____ Email Address: _____

*Duke Class: _____ Duke Class: _____

*Please describe your planned gift. Select one of the following options:

- Will Revocable "Living" Trust Retirement Account Other: _____

*Is your planned gift restricted to a specific area or purpose at Duke? If so, please specify below:

Please provide an estimate of the current value of your planned gift to Duke. All such information will be kept confidential. This estimate does not bind you or your estate in any way.

Estimate: _____

Duke Heritage Society: Your planned gift entitles you to become a member of the Duke Heritage Society and have your name(s) listed with other society members. You will receive a Duke Heritage Society certificate, invitations to special events, and can elect to receive our quarterly Duke Blueprints e-newsletter.

*Select one of the following options:

- Yes, I/we would like to be listed as a member of the Duke Heritage Society.
 Yes, I/we would like to be a member of the Duke Heritage Society but list my/our gift as "anonymous."
 No, please do not include me/us in the Duke Heritage Society.

*Signature: _____ *Date: _____

Spouse/Partner: _____ Date: _____

This document does not bind you or your estate. By signing this form, you are simply acknowledging your current plans to benefit Duke both now and in the future through the Duke 100 Challenge and giving us guidance as to your wishes.

Questions? Contact the Office of Gift Planning: (919) 681-0464 | giftplanning@duke.edu | giving.duke.edu