

URI prefers to have copies of wills, trusts, beneficiary designations and other documents that leave assets to the University. There are several reasons for this:

- You help us to clarify the intent of your gift.
- We may have suggestions that can increase the tax effectiveness of the gift.
- With sufficient information to meet accounting standards, part or all of your gift can be credited toward campaign fundraising goals.

We understand that circumstances change and plans for passing property at death can change with them. Providing us with a copy of a document does not obligate you in any way should you decide to change your plans at a later date. We promise to respect your privacy and request that any written information you do not want to share be blacked out or deleted from the pages you provide to us.

Documenting a gift of a specific dollar amount

If you are making a gift of a specific dollar amount (“I give \$25,000 to the University of Rhode Island Foundation...”), URI requests a copy of the document making the gift, or the section within the document noting the gift.

Documenting a gift of an indeterminate amount

For this type of gift (“I give one fourth of the residue of my estate to the University of Rhode Island Foundation...”), please attach a copy of the gift document (as noted above). This would also include beneficiary designations, for example, of retirement assets or life insurance.

GIFT RECOGNITION

1892 Society: The 1892 Society was established more than 30 years ago to recognize alumni and friends who make charitable planned gifts to the University. Minimum documentation for membership requires only a signed statement indicating your intention; though for reasons noted above, it is beneficial for both you and the URI Foundation to share as much detail regarding the gift as possible to ensure that your intent is fulfilled.

Your name will be listed with other members of the 1892 Society unless you wish to remain anonymous.

If you have any questions please contact the **Office of Gift Planning, URI Foundation, 79 Upper College Road, Kingston, RI 02881; 401.874.7900 or 1.877.874.4555, fax 401.874.5524, foundation@uri.edu.**