



UNIVERSITY WOMEN'S  
FOUNDATION  
*of Jefferson County*

## Legacy Society

PO Box 644, Port Townsend, WA 98368

The University Women's Foundation (UWF)  
is the philanthropic arm of AAUW Port Townsend.

**Bequests, Beneficiary Designations under Wills, Trusts, Life Insurance Policies, Commercial Annuities, Retirement Plans, and Other Planned or Future Gifts:** Donors are encouraged to name UWF as the beneficiary under these instruments. Following verification of the planned gift, the donor will be named to the UWF's Legacy Society. Please attach documentation to substantiate your future gift to UWF.

**Legal Counsel.** UWF urges prospective donors to seek the assistance of their personal legal and financial advisors in matters relating to their gifts, including the resulting tax and estate planning consequences. Donors are responsible for all costs of legal and advisor fees.

Your name \_\_\_\_\_

Address \_\_\_\_\_

Email \_\_\_\_\_ Phone \_\_\_\_\_

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

\_\_\_\_\_ I wish to have my future gift remain anonymous.

How would you like your gift to be used when it is received? Please initial.

\_\_\_\_\_**Scholarship Endowment Fund.** Your gift will be added to the gifts of other donors to fund existing and future named endowed scholarships.

\_\_\_\_\_**Named Endowed Scholarship.** Your gift of at least \$50,000 to the UWF Endowment Fund will name an endowed scholarship. Your gift will guarantee an annual scholarship in perpetuity, based on 90% of earned interest and dividends of the principal, with 10% being reinvested. Other UWF endowment gifts may contribute to the scholarship.

Scholarship name \_\_\_\_\_

(over)

\_\_\_\_**Named Operating Fund Scholarship.** Your gift of at least \$2500, to be liquidated within two years of receipt, will fund a current year named scholarship, supporting scholarships of \$2500 at a minimum.

Scholarship name\_\_\_\_\_

\_\_\_\_**Named Quasi-Restricted gift.** Your gift of at least \$15,000 will be used to fund a named scholarship for a designated period of up to 15 years. The gift will be independently tracked and will be fully expended at the end of the term. Your gift will support scholarships of \$2500 at a minimum.

Scholarship name and amount\_\_\_\_\_

\_\_\_\_**Operating Fund.** Your gift will be used to fund current operations, high school and other scholarships, and current programs.

When your gift is received, the above designation may be changed in the event the minimum gift for a chosen named scholarship is not met.

Please list any family members who should be informed when your gift is received and used by UWF.

Name

Address

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