

**Note:** This is a nonbinding information form to ensure that appropriate information about your gift plans has been supplied to the UW-Eau Claire Foundation. **Please print out this form, complete it and send it to:**

**Planned Giving Office  
UW-Eau Claire Foundation  
P.O. Box 4004  
Eau Claire, WI 54702-4004  
Fax: 715-836-4375 Phone: 715-836-3819**

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## Council Oak Society Declaration of Intent

*Membership in the Council Oak Society is reserved for those who have confirmed that they have made a provision in their estate for the University of Wisconsin-Eau Claire Foundation Inc.\**

As an expression of my/our commitment to the University of Wisconsin-Eau Claire, I/we have made estate provisions to support the UW-Eau Claire Foundation through:

- |  |   |  |
|--|---|--|
| <input type="checkbox"/> Will                  | <input type="checkbox"/> Charitable Reminder Trust      | <input type="checkbox"/> Other (please describe) _____ |
| <input type="checkbox"/> Trust                 | <input type="checkbox"/> Charitable Gift Annuity        | _____  |
| <input type="checkbox"/> Pooled Income Fund    | <input type="checkbox"/> IRA or Other Retirement Assets | _____  |
| <input type="checkbox"/> Life Insurance Policy |   | _____  |

In the approximate amount of \$ \_\_\_\_\_ (confidential)

Percentage \_\_\_\_\_ (confidential)

Other (please describe) \_\_\_\_\_

- I/We have included a copy of the portion of my/our estate document that names the **University of Wisconsin-Eau Claire Foundation** as a beneficiary. I/We understand it will be kept in a confidential file.
- I/We give permission for my/our name(s) to be listed as members of the Council Oak Society, with the understanding that the amount of my/our arrangements will be strictly confidential. Please enter my/our name(s) as: \_\_\_\_\_
- Although the University of Wisconsin-Eau Claire Foundation is currently included in my/our estate, I/we do not wish to be members of the Council Oak Society or listed on the honor roll or prefer to be listed anonymously.

I/We wish to direct our support to the following area at the university:

\_\_\_\_\_

This Declaration of Intent is an expression of my/our present plans and is subject to change or modification by me/us. If changes are made, I/we will notify the UW-Eau Claire Foundation.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

The undersigned, being a duly authorized officer of the UW-Eau Claire Foundation, does hereby accept this gift.

\_\_\_\_\_  
Foundation Officer Name

\_\_\_\_\_  
Foundation Officer Signature

Date \_\_\_\_\_  
Rev. 06/17/03

*\*In creating your gift documents, please make sure the wording designates your gift to the **University of Wisconsin-Eau Claire Foundation** to ensure the proper receipt and credit of your gift.*