



Cumberland UNIVERSITY

CONFIDENTIAL STATEMENT OF BEQUEST PROVISION

Name: _____ Phone(s): _____

Home Address: _____

_____ E-mail: _____

Cumberland degree and year of graduation (if applicable): _____

Date of Birth (month/day/year): _____

I have made a provision for Cumberland University in my estate planning as follows:

<u>Type of Provision</u>	<u>Estimated Amount</u>
A. Outright bequest in my will of:	\$ _____
B. Percentage of residue of estate _____%.	
Estimated present value of estate is \$ _____.	
Therefore, estimated value of bequest gift is:	\$ _____
C. Life Insurance Policy	\$ _____
D. Testamentary Trust arrangement with Cumberland University, the Beneficiary. (Please include names and birthdates of beneficiaries and describe terms and conditions) _____	

Please indicate specific purpose below (please note that "Cumberland University, a Tennessee not-for-profit corporation" is the legal entity to be named in the will. Further specific designation must be detailed therein):

____ Unrestricted to Cumberland University

____ Unrestricted to the following Cumberland University school or department: _____

____ Restricted for the specific purpose of: _____

**A copy of your will, trust agreement or other documents or the applicable provisions would be greatly appreciated.*

Signature _____ Date: _____

Please know that this form is for record-keeping purposes only. It is not a legal document and in no way restricts your ability to change your will at any time. The details of all bequests remain confidential. On behalf of everyone who will benefit, thank you for supporting the work of Cumberland University. Please return this form to Cumberland University, Office of Advancement, One Cumberland Square, Lebanon, TN 37087 or fax to (615) 443-1806.

For more information, please contact Stephanie Ferrell, CFRE, Development Officer, Planned & Major Gifts, at (615) 547-1235 or sferrell@cumberland.edu.