



Bequests

What will your legacy be?

If you are like many Ospreys, UNF has played an important role in your life. It is almost impossible to put a dollar figure on what your experiences are worth. By making a bequest, you can acknowledge UNF in a meaningful way and make a lasting difference for the university and for your own personal legacy.

What is a bequest?

The term “bequest” usually refers to a statement in your written estate plan of your wishes to provide charitable funding for UNF after your death. It is also common to provide charitable designations through retirement plans or IRAs, life insurance policies, revocable and irrevocable trusts, and government savings bonds.

Thank you for considering a gift to the UNF Foundation through your will or living trust. We would be honored to fulfill your wish to support the programs and students of the University of North Florida. Below is language you may wish to use.

To specify an amount: I give to the University of North Florida Foundation, Jacksonville, Florida, (write out value) dollars (\$ show numeric value). My bequest may be used to apply for any state, federal, or private matching funds for which it may qualify.

To give one or more particular assets: I give to the University of North Florida Foundation, Jacksonville, Florida, (describe the assets: e.g., 100 shares of XXX stock or the condominium located at XXX address) held in my estate or trust. My bequest may be used to apply for any state, federal, or private matching funds for which it may qualify.

To give what remains after other obligations are satisfied: I give the rest, residue, and remainder of my estate (or trust) to the University of North Florida Foundation, Jacksonville, Florida. My bequest may be used to apply for any state, federal, or private matching funds for which it may qualify.

To give a percentage: I give to the University of North Florida Foundation, Jacksonville, Florida, (write out the number) percent (number value %) of my estate (or trust). My bequest may be used to apply for any state, federal, or private matching funds for which it may qualify.

To make UNF a contingent beneficiary, should other beneficiaries predecease you: I give to my spouse all of the property in my estate (or trust). In the event my spouse does not survive me, I give (describe asset, amount, residual or percentage) to the University of North Florida Foundation, Jacksonville, Florida. My bequest may be used to apply for any state, federal, or private matching funds for which it may qualify.

To fulfill a lifetime commitment: To the extent I have not given the sum of (write out value) dollars (\$ show numeric value) to the University of North Florida Foundation, Jacksonville, Florida, (or the John and Jane Doe Scholarship Fund), during my lifetime, I leave the amount necessary to bring my total giving to the University of North Florida Foundation, Jacksonville, Florida, (or the John and Jane Doe Scholarship Fund) to that amount.

What do you want your bequest to achieve? Although a general bequest is of great value and allows the Foundation to fulfill the most pressing needs of the time for the University, many UNF donors have specific areas they wish to support. You may designate your bequest for purposes such as student scholarships, academic programs, research, and/or faculty positions. We strongly encourage you to contact our office in advance so that we may help you develop language to capture your unique charitable intentions.

Bequests are most often used to create endowed funds that preserve your name or the name of a loved one and to support what matters most to you forever.

Example #1: I give to the University of North Florida Foundation, Jacksonville, Florida, the residual of my estate (or trust) or (describe asset) to establish the John and Jane Doe Scholarship Fund, an endowed fund to support scholarships for students in the College of _____. My bequest may be used to apply for any state, federal, or private matching funds for which it may qualify.

Example #2: I give to the University of North Florida Foundation, Jacksonville, Florida, the residual of my estate (or trust) or (describe asset), to establish the John and Jane Doe Education Research Fund, as outlined in a gift agreement previously agreed to by the University of North Florida Foundation and me. My bequest may be used to apply for any state, federal, or private matching funds for which it may qualify.

Example #3: I give to the University of North Florida Foundation, Jacksonville, Florida, the residual of my estate (or trust) or (describe asset), to establish the John and Jane Doe Education Research Fund. This fund will be set up to conduct research at the University of North Florida in the area of _____. My bequest may be used to apply for any state, federal, or private matching funds for which it may qualify.

If in the future this bequest cannot be usefully applied for the described purpose, I authorize the board of trustees of the University of North Florida Foundation, Jacksonville, Florida, (or the John and Jane Doe Education Research Fund) to apply this bequest to such other purposes as it in its discretion may determine to be consistent with my original intent as stated above.

The University of North Florida Foundation can accept a wide range of assets and gift vehicles in order to achieve your charitable goals.

Consult with your attorney or financial professional as well as a member of our Planned Giving team in order to create your unique and personal UNF legacy. Contact us at (904) 620-5377 or planned.giving@unf.edu.

University of North Florida Foundation Jacksonville, Florida, Federal Tax ID # 23-7167701