

THE 1955 LEGACY SOCIETY MEMBERSHIP ENROLLMENT FORM

Last Name _____ First Name _____ Initial _____

Address _____ City _____ State _____ ZIP _____

I have made or I intend to make the following planned or deferred gift(s):

1. Gift through **Will** **Irrevocable Trust** **Revocable Trust**

Specific Amount Charitable Remainder Trust Life Estate to my Spouse, Children or Others

Remainder of Estate if my Heirs Do Not Survive Me Percent of Estate _____ % **Estimated Value**

Remainder of Estate Specific Property (description) _____

Executor Name _____ Phone Number _____

2. Gift through Charitable Trust **Estimated Value**

Charitable Lead Trust Charitable Remainder Annuity Trust Charitable Remainder UniTrust

Trustee Name _____ Phone Number _____

The UM Foundation is pleased to serve as trustee. If another trustee has been named, please indicate above.

3. Gift through Life Insurance Policy **Cash Surrender Value**

Old Policy New Policy Term Whole Life Other _____

Face Value

Company Name _____ Policy Number _____

Owner Name _____ Beneficiary Name _____

4. Gift through Retirement Plan **Estimated Value**

Percentage ___ % Amount 401(k) IRA Other _____

Plan Administered through _____ Phone Number _____

5. Gift through Paid on Death Arrangements with Financial Institutions **Estimated Value**

Checking/Savings Account Certificate of Deposit Brokerage Account Mutual Fund Account

Institution Name _____ Phone Number _____

6. Gift through Land Deed **Estimated Value**

Remainder Interest in Home Farm Other _____

Please contact UMMC in advance.

Purpose of the Planned or Deferred Gift

Unrestricted for the greatest flexibility in support of The University of Mississippi Medical Center.

Restricted for the following purpose _____

Endowed for the following purpose _____

UMMC is pleased to prepare a suitable Memorandum of Agreement for your signature.

How would you like your name listed on the Legacy Wall? _____

Signature _____ Date _____

I prefer that my name not be included in published lists of the 1955 Legacy Society members.