

OUTSIDE TRUST ACKNOWLEDGMENT/CONFIRMATION FORM

Date: _____

Name of Donor: _____

Name of Spouse (or other beneficiary): _____

Date(s) of Birth: _____ / _____ / _____ _____ / _____ / _____
(Donor) (Beneficiary)

PART I CONFIRMATION Please let us know the terms of your trust.

A. Type of Trust:

I have provided for Carnegie Mellon through my:

- Unitrust* *Annuity* *Revocable* *Irrevocable*
(no gift credit)

B. Designation of Trust:

Unrestricted: Please use the proceeds in support of those areas with the greatest need, as determined by the President.

General Endowment: Please add the proceeds to the university's general endowment.

Restricted: Please use the proceeds as unrestricted, expendable support for the following school or department _____.

Named Endowed Fund: Please establish an endowed fund in the following name _____, to be used for _____.
(I understand that as of July 1, 2004 a minimum of \$50,000 is needed to endow a fund, and that over time this minimum will increase.)

Please see attached list of endowed fund gift opportunities.

C. My trust is in the following form and amount:

- Percentage of Trust:* Percentage _____ %
Since trusts often grow over time, designating a percentage of your trust vs. a dollar amount will maintain the value of your gift.
- Cash:* Amount \$ _____
This includes stocks, bonds and other liquid assets.
- Specific:* Property _____
A specific gift is one in which you designate specific assets to Carnegie Mellon, such as stock or real estate.
- Residuary:* (no gift credit) Estimated Amount \$ _____
Carnegie Mellon is the remainderman of your trust after other individuals have been provided for.
- Contingent:* (no gift credit) Terms _____
The gift to Carnegie Mellon takes place only if the beneficiaries named in your will predecease you.

PART II ACKNOWLEDGEMENT Please let us know if/how we may recognize your generosity.

- YES**, I give Carnegie Mellon permission to publish my/our name(s) in university publications and donor acknowledgements. **I understand I am now a member of the John C. Warner Planned Giving Society.**

How do you wish your name(s) to be listed in any publications that acknowledge your gift intention?

- NO**, I wish my gift to remain anonymous.

Donor's Signature

Date

Endowed Fund Minimum Giving Levels

PROFESSORSHIPS:

Deanship	\$5 million
School Head/Department Head/Center Director	\$3 million
Distinguished Professorship	\$2.5 million
Career Development Professorship	\$1.25 million

NAMED FELLOWSHIPS AND SCHOLARSHIPS:

Full Tepper School Graduate Fellowship	\$750,000
Full Graduate Fellowship	\$750,000
Full Undergraduate Scholarship (need based)	\$750,000
Carnegie Mellon Scholarship (need based)	\$600,000
Judith Resnik Scholarship (women students)	\$600,000
Andrew Carnegie Scholarship (half tuition, merit based)	\$300,000
Presidential Scholarship (merit in excess of need)	\$100,000
Graduate Fellowship (partial)	\$50,000
Undergraduate Scholarship (partial)	\$50,000

OTHER:

Student Educational Enhancement Funds	\$50,000
Faculty Support Funds	\$50,000
Department Support Funds	\$50,000
Library Funds	\$25,000
SURG Funds (undergraduate research grant)	\$10,000