



**UNI**  
*Legacy Society*  
University of Northern Iowa



## What is the UNI Legacy Society?

Members of UNI Legacy Society are a special group of friends who have provided for the university in their estate plans. A bequest or deferred gift of any size or type brings an invitation to become a member of UNI Legacy Society. Membership means continued funding for scholarships, faculty support, research and facilities.

The common thread among the members of UNI Legacy Society is a strong belief and confidence in the work of the University of Northern Iowa. We invite you to consider joining this unique group of friends and participating in the various special programs available to UNI Legacy Society members.

### **The following types of planned gifts invite membership into the UNI Legacy Society:**

Gift through Will or Trust

Gift that Provides Life Income (Gift Annuities/Charitable Remainder Trusts)

Gift of Beneficiary Designation (IRA/Life Insurance/Retirement Assets)

Membership in the UNI Legacy Society presents the opportunity to participate in various special programs.



In September 1876, David Sands Wright, one of the original faculty members of the new Iowa State Normal School, stood in front of 27 students and asked pointedly, "What is grammar?" With that query, the first course of instruction was underway at what is now the University of Northern Iowa. The Old Central bell remains today as a venerable legacy of the university's heritage and a befitting symbol of UNI Legacy Society.

## Frequently Asked Questions

**Q: Why is it important to document my planned gift by completing the UNI Legacy Society form?**

**A:** Your UNI Legacy Society form, along with your will or other estate documents, serves as your instructions to us for the use of your funds. This documentation is helpful in many ways especially in articulating your wishes, providing the opening to express our sincere gratitude and keep you informed about activities and developments at UNI in your interest areas.

Additionally, our practice for endowment and other gifts with unique restrictions is to prepare a statement of gift intent. This nonbinding document confirms our commitment to your wishes and can be changed at any time by mutual consent.

We want you to remain confident that your estate provision will be well-received and prudently applied per your instructions and the documents described provide clarity in that regard.

You may share as much or as little information about your future gift to suit your comfort level. Be assured that our staff will honor your wishes and respect the confidential and nonbinding nature of your gift and the information you share.

**Q: Does completing the UNI Legacy Society form constitute a contract?**

**A:** The UNI Legacy Society form is not a legally binding document, but rather a good faith declaration that you have included or intend to include UNI in your estate plans understanding that circumstances can change over time.



**Q: How can I estimate the value of my bequest or other planned gift? I'm not sure what the amount will be in the future.**

**A:** We ask you to provide your best estimate of the value of your bequest or other planned gift based on its current value. These estimates provide a starting point for planning purposes. Many donors allocate a percentage of their estate or other asset rather than a specific dollar amount because the value of their estate rises and falls over time, and it is difficult to predict what might be needed for their own care and well-being.

**Q: What are the benefits of joining the UNI Legacy Society?**

**A:**

- A certificate of membership
- An invitation to special events honoring your generosity
- Becoming a member of UNI Legacy Society may also qualify you as a member of the UNI President's Club. Minimum requirement: \$50,000 for a life income gift and \$100,000 or more for other deferred gifts.



Thank you for considering membership in the prestigious UNI Legacy Society. Planned giving is like planting a tree—it is planted for the benefit of tomorrow's generations.