

North Carolina Museum of Art Foundation

Deferred Gift Information Sheet

Name: _____ Spouse Name: _____
 Date of Birth: _____ Date of Birth: _____
 Address: _____

I/We are happy to let you know about a deferred gift to benefit the North Carolina Museum of Art:

<u>Type of Gift</u>	<u>Value of NCMA Foundation's Share</u>
▪ Gift by Will	
- Outright bequest	\$ _____
- Contingent bequest	\$ _____
- Residual bequest - _____% of my estate	\$ _____
▪ Retirement Plan Assets	\$ _____
▪ Charitable Remainder Trust¹	\$ _____
<input type="checkbox"/> Irrevocable	
<input type="checkbox"/> Revocable	
▪ Life Insurance Policy	\$ _____
<input type="checkbox"/> Owner/Beneficiary <input type="checkbox"/> Beneficiary Only	
▪ Other _____	\$ _____

¹ Remainder to NCMA Foundation is either irrevocable, meaning it is vested and cannot be revoked, or it is revocable, meaning you've retained the right to amend or change NCMA Foundation's interest.

Designated Purpose

- Unrestricted
 - Restricted, to be used as follows: _____
-

Acknowledgment

It is our policy to inform the Museum Director and department(s) benefiting from your gift. If you wish to limit acknowledgment from the policy mentioned above, check a box below.

- Please notify the Museum Director and the benefiting department(s) but no external listing.
- Please *do not* notify the Museum Director or the benefiting department(s) and no internal or external listings.

We would greatly appreciate a copy of your will, trust agreement, or other planning document (or applicable excerpt). This allows us to review the language to insure that your wishes can be carried out as you intend.

Please send this information to:
Ellen Stone, Director of Development
North Carolina Museum of Art
4630 Mail Service Center
Raleigh, NC 27699-4630

Signature	Date
Signature	Date