

3. I would like my gift used for the following purpose(s):

OR It is my intention that my gift be added to an existing fund (listed below) and governed by all related agreements:

4. My estimate of the current value of my gift is:
\$

(A copy of the relevant portion of the legal documents in which your gift is described would be helpful but is not required.)

■ I would rather not disclose the value of my gift.

5. In recognizing this gift, you are authorized to list the following name(s) as

Charles F. Allen Legacy Society members:

■ List my gift as being given by an Anonymous Donor.

6. ■ Please send me more information about making a bequest or deferred gift to benefit the University of Maine and becoming a member of the Charles F. Allen Legacy Society.

7. I understand that staff members of the Society’s sponsoring organizations are available for consultation with me and my attorney and/or others to assist in drafting a bequest or setting up a deferred gift.

■ Please have a staff member contact me.

This Statement of Intent is non-binding and you may change or void it at any time.

Please return this Statement of Intent to:

University of Maine Foundation
Two Alumni Place, Orono, Maine 04469-5792
800.982.8503 or 207.581.5100
or umainefoundation.maine.edu
This information is also available online:
umainefoundation.org.

Bequest & Deferred Giving

There are many ways to remember the University of Maine in your estate plans. Provisions may be in the form of a bequest, a charitable remainder trust, a pooled income fund, a charitable gift annuity, a retirement fund or life insurance beneficiary designation or other form of planned or deferred gift. There are often personal tax advantages with proper planning.

The University of Maine Foundation has professional giving officers ready to work with you and your advisors to develop a plan which best suits your goals.

Bequest Language

By providing for the Foundation in a will, you can make a substantial contribution without diminishing assets during your lifetime. Here is sample language for remembering the University of Maine in a will or trust:

“I give and bequeath to the UNIVERSITY OF MAINE FOUNDATION for the benefit of the University of Maine, Orono, Maine (possible choices follow):

- the sum of \$ _____; OR
- _____ percent of my estate; OR
- the property described herein.

To establish the _____ Fund.

The principal is to be endowed and only the distributions, as established by the University of Maine Foundation Board of Directors, shall be used for _____.”

A Message from a Member



Edie McVay King with two of the recipients of her scholarship at the College of Natural Sciences, Forestry and Agriculture Annual Scholarship Recognition Banquet.

“We joined the Charles F. Allen Legacy Society because the University of Maine has been a big part of our lives for many years and we felt it was very important to help our alma mater financially. We are also members of the Stillwater Society and the President’s Club.

In establishing our scholarships, we each chose areas which were special to us. The Edie McVay King Scholarship supports UMaine microbiology students and the Louis C. King Scholarship supports UMaine education majors from the four high schools in our area.”

– EdieMcVay King ’67 and Louie King ’60



Two Alumni Place, Orono, ME 04469-5792
800.982.8503 or 207.581.5100

75 Clearwater Drive, Suite 202
Falmouth, ME 04105-1455
800.449.2629 or 207.253.5172

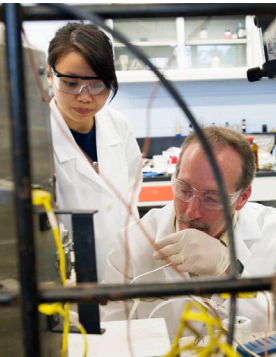
umainefoundation.org • umainefoundation@maine.edu

An Invitation to Join



LEGACY SOCIETY

Charles F. Allen



UNIVERSITY of MAINE
FOUNDATION

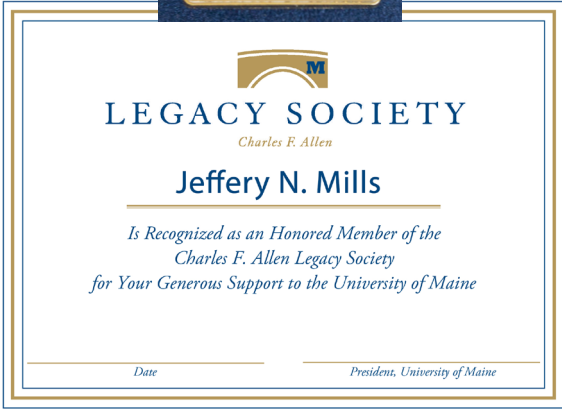
umainefoundation.org



Jeffery N. Mills, Ph.D.
President/CEO
University of Maine Foundation

I would personally like to invite you to join me and nearly 800 others as members of the ***Charles F. Allen Legacy Society*** which was established in 1995 to recognize and honor alumni and friends who intend to remember the University of Maine or its affiliated organizations in their estate planning. If you let us know that you have provided for the University of Maine or its affiliated organizations by making a bequest or other form of planned or deferred gift, you immediately become a member of the Society. Your gift need not be irrevocable and we understand that situations change. Such gifts will benefit the University in the years ahead in any way you choose to designate without requiring that you fund the gift at the present time.

Every gift is deeply appreciated and membership in the Legacy Society provides one way for the University to show its gratitude for your investment in the future of the University of Maine.



Legacy Society members receive:

- A membership certificate
- A lapel pin
- A listing in the membership booklet (optional)
- An invitation to the Charles F. Allen Legacy Society Luncheon
- Privileged access to certain University events and personnel
- Personal satisfaction in creating a legacy

To learn more about the advantages of the different types of gifts, please contact us or simply complete and return the Statement of Intent to enroll in the Society.

Gift Designation



Any gift for the University of Maine is greatly appreciated. Choosing how to designate your gift offers you the opportunity to create a personal legacy.

Designation suggestions include:

Scholarships

Professorships

Facilities

Programs

Support for Existing Funds

Excellence Funds

Additional examples of designated gifts can be found at umainefoundation.org.



LEGACY SOCIETY

Charles F. Allen

STATEMENT OF INTENT

I wish to become a member of the Charles F. Allen Legacy Society to demonstrate my support for the University of Maine.

Name(s)

Address

Tel.

Email

- 1.** I have made a provision (suggested goal of \$10,000) in my estate planning to benefit the University of Maine through the organization(s) marked below:
- University of Maine Foundation
 - Pine Tree State 4-H Foundation
 - University of Maine Alumni Association
 - University of Maine
 - University of Maine Pulp & Paper Foundation
- 2.** The provision is in the form of a:
- Bequest
 - Charitable Remainder Trust
 - Pooled Income Fund
 - Charitable Gift Annuity
 - Retirement Fund beneficiary designation
 - Life Insurance
 - Other form of deferred or “planned” gift for the benefit of the University of Maine.
- Please describe: