



How to Create a Charitable Bequest for UH

Creating a charitable bequest to benefit the University of Hawai'i through your will or revocable trust is easy! Plus, you can direct your gift to any program or purpose within UH's ten campus system or you can make an unrestricted gift and let UH determine how your gift can make the biggest impact. Whichever you choose, just follow the five simple steps below and give the attached charitable bequest form to your attorney. He or she will do the rest!

1. Identify the area at UH you are passionate about and want to support.

- If you would like assistance in finding which college, school, department or scholarship is most closely aligned with your personal interests, please contact us at the Office of Estate and Gift Planning at (808) 956-8034 or giftplanning@uhf.hawaii.edu, and we can help you investigate gift opportunities at UH.

2. Decide how much your gift will be.

- It can be a "specific bequest" (specific dollar amount) or a "residuary bequest" (a percentage of your estate). If you would like assistance in determining what size bequest would be effective to accomplish your goals, please contact us at the Office of Estate and Gift Planning at (808) 956-8034 or email giftplanning@uhf.hawaii.edu.

3. Determine how long you want your gift to last.

- Create an endowment account (a gift in perpetuity where the income is distributed to UH and the principal preserved)

OR

- Create an expendable account (a gift where the income and principal can be distributed to UH.)

4. Complete the attached charitable bequest form and deliver it to your attorney.

5. Optional: Contact us, confidentially, at the Office of Estate and Gift Planning to let us know about your revocable charitable bequest.

- We can help you determine if it is appropriate to enter into a "Gift Agreement" with UHF. A gift agreement is a written understanding signed by you, UH and UHF that will outline precisely how your charitable bequest is to be used and assures that your wishes can be met and your gift properly administered in the future.
- We are happy to work directly with your lawyer and other advisors if desired.



UHF TAX ID:
99-008-5260

CHARITABLE BEQUEST INSTRUCTIONS FOR ATTORNEY

Date: _____

To: _____
Attorney's Name

From: _____
Your Name

I wish to create a charitable bequest to University of Hawai'i Foundation, for the benefit of the University of Hawai'i.

Please contact the Office of Estate and Gift Planning, if needed, to assist you with the precise language to be used in my will or revocable trust. Based upon my responses below, they can help provide appropriate wording to ensure that my charitable bequest is used in the manner I wish.

1. The purpose of my gift is:

Restricted for the following purpose(s):

For the greatest needs and opportunities at the University of Hawai'i

To be used according to my gift agreement, which:
 Has been created Needs to be created

2. The amount of my bequest will be:

Percentage of my residuary estate _____ %

Specific dollar amount \$ _____

University of Hawai'i Foundation
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