Tulsa Community Foundation
Planned Giving Challenge Grant 2012 – 2013

Gift Verification Procedures

1. Fill out the attached "Gift Verification Form".

2. The following language <u>must</u> be used in designating your agency as a beneficiary in a gift in order for it to count towards the Planned Giving Challenge Grant.

   Tulsa Community Foundation (73-1554474) for the benefit of [Agency Name] Endowment Fund, Tulsa, Oklahoma.

3. Make copies of:
   a. Wills and Trusts:
      i. The first page of your legal document that has your name and title of the legal document.
      ii. The page in your legal document that specifies the gift amount being made to the charity participating in the challenge grant. (You may black out any gifts on that page that are designated to other charities or heirs.)
      iii. The signature page of your document.
   b. Beneficiary Designations (insurance, retirement, and POD documents):
      i. Copy of signed form and include policy/account number.
      ii. Copy of most recent account statement.

4. Mail the following documents:
   a. The <u>original</u> "Gift Verification Form".
   b. Copies of either 3a or 3b from above.

   To:

   The Advancement Group, Inc.
   9175 South Yale Avenue, Suite 200
   Tulsa OK 74137

For additional questions, please call Mark Loeber or Chris Miller at 918-491-0079.

THE ADVANCEMENT GROUP, INC.
9175 South Yale Avenue, Suite 200   **(918) 491-0079 Office**
TULSA, OKLAHOMA 74137   **(918) 491-0087 Fax**
Email Address: mark@tagpg.org or chris@tagpg.org

I.   DECLARATION OF INTENT:

On, _____, I/my client (name optional) _____ included
_____ in their estate plan.
<small>Charity Name</small>

GIFT INSTRUMENT

_____ through a Will   _____   through a trust

_____ through a codicil to a Will   _____   through other gifts (e.g., insurance
                                                                                      stocks, cash, etc.) _____

ESTIMATED GIFT VALUE

_____ for a specific amount which should be approximately $_____

_____ for a percentage which should be approximately $_____

I/we am providing the following non-binding information in order to substantiate a gift under the Tulsa Community Foundation Planned Giving Challenge Grant. My attorney or other professional advisor is further authorized to supply Tulsa Community Foundation and/or The Advancement Group, Inc. with copies all wills, trusts, and supporting documents executed by me/us to fulfill the Planned Giving Challenge Grant goal.

_____   _____
Name   Date

_____   _____
Name   Date

On the following page please provide your date of birth with any supporting legal documents to allow calculation and valuation of the gift.

II. DESIGNATED CHARITY(S):

NAMES AND PERCENTAGES TO CHARITY:

NAME OF CHARITY	**CITY/STATE**	**PERCENTAGE(S)**
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

III. PERSONAL INFORMATION:

*NAME _____ BIRTHDATE _____
    Full Legal Name - Please Print

SPOUSE _____ BIRTHDATE _____
    Full Legal Name - Please Print

HOME ADDRESS _____

CITY _____ STATE _____ ZIP _____

EMAIL _____

COUNTY OF RESIDENCE _____ PHONE (___) _____

*Please leave name blank if choosing to remain anonymous

IV. LEGACY SOCIETY AND DISCLOSURES:

☐ Yes, include me in the agency's legacy society

☐ No, do not include me in the agency's legacy society

Disclosure of Gift Information:

☐ Release name and gift amount to the agency

☐ Release my name only (your gift will still count towards the agency's goal)

☐ Release my gift amount only