



Development and Alumni Relations ■ Grasse Mount ■ 411 Main Street ■ Burlington, VT 05401-3470
 Telephone (802) 656-8600 ■ Toll Free (888) 458-8691 Fax (802) 656-8678 ■ Web alumni.uvm.edu

SAMPLE

Gift Agreement

DONOR INFORMATION	
Name of Donor(s):	IMA DONOR
Address:	123 MAIN ST ANY TOWN, USA
Phone:	
Email:	

FUND(S) YOU WISH TO SUPPORT	AMOUNT
The UVM Fund - To support the general purposes of the university	\$
The Parents Fund - To support the general purposes of the university	\$
Pinnacle Fund - To provide annual scholarship assistance	\$ 100,000
College or School	\$
Department, Program, Student Group or Team	\$
Other Fund	\$
Other Fund	\$
New Fund*	\$
New Fund*	\$
Total Commitment	\$ 100,000

* Requires additional documents.

COMMENTS OR OTHER INFORMATION

SAMPLE

PLEDGE PLAN	
One payment in full	Due Date:
Installment Options <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input checked="" type="checkbox"/> Semiannually <input type="checkbox"/> Annually <input type="checkbox"/> Payroll deduction	Amount per installment: \$ 20,000
	Date of First/Next Installment: DEC 2006
Will or Revocable Trust Provision (please attach a copy of relevant sections for UVM's files)	Estimated Amount to UVM: \$
	Name and Date of Trust, if applicable:
Does your pledge plan include recommending gifts to UVM through any of the following: family foundation, community foundation, charitable foundation (such as Fidelity) or a private business or corporation? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes <input type="checkbox"/> Maybe	

PAYMENT NOW		
Check or Cash Enclosed	Amount \$	
Credit Card <input type="checkbox"/> Master Card <input type="checkbox"/> Visa <input type="checkbox"/> Discover <input type="checkbox"/> AMEX	Card Number	
	Expiration Date	
	Stock <ul style="list-style-type: none"> • Morgan Stanley • DTC#: 015 • Account#: 413-011702 • In the name of the University of Vermont and State Agricultural College • Tax ID#: 030179440 	Name / Symbol MERCK # of Shares APPROX 50 Broker
	Gift-In-Kind/Property <input type="checkbox"/> Yes, UVM may sell the GIK/Property and use the proceeds. <input type="checkbox"/> No, UVM may not sell the GIK/Property.	Description of Property Estimated Value* \$
<small>*Note, if value is \$5,000 or more, IRS requires an independent appraisal (form 8283).</small>		

SAMPLE

GIFT OPTIONS

Do you want your commitment to be anonymous?

No
 Yes

Do you wish to make this commitment in honor of someone?

No
 Yes, and the person is: **PROFESSOR JONES**

Do you wish to make this commitment in memory of someone?

No
 Yes, and the person is:

Does your employer make matching gifts?

No
 Yes

Will the University provide a naming opportunity* for this gift?

No
 Yes, and the naming is: **FIRST FLOOR GRASLEMOUNT CONF ROOM "JMA DONOR CONFERENCE ROOM"**

* Naming opportunities are for the life of the building or facility.

If applicable (Athletics, Fleming, Libraries, etc.), do you wish to accept benefits for which you are eligible due to your gift?

Yes
 No

ACCEPTANCE – Signatures required if commitment is over \$10,000

Accepted by the donor(s).

<u>Ima Donor</u> Signature	<u>JMA DONOR</u> Print Name	<u>10/2/06</u> Date
_____ Signature	_____ Print Name	_____ Date

Accepted on behalf of the University of Vermont and State Agricultural College.

<u>Ray Zarr</u> Signature	<u>RAY ZARR</u> Print Name	<u>10/4/06</u> Date
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The
Greatness
within Our
Grasp

THE CAMPAIGN FOR THE
UNIVERSITY
OF VERMONT

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October 2, 2006

Ima Donor
123 Main St.
Anytown, USA

SAMPLE

Dear Ima,

You are opening doors to new opportunities for many students. Professor Jones and I are very excited about your generous commitment of \$100,000 to the Pinnacle Fund.

Your pledge is payable in five annual installments, starting December 2006, and, as you indicated in our conversations, you will determine later if payments will come from you, your company or your family foundation. As requested, I have included DTC stock instructions since you intend to make your first payment with approximately 50 shares of Merck stock shortly.

- Morgan Stanley
- DTC#: 015
- Account#: 413-011702
- In the name of the University of Vermont and State Agricultural College
- Tax ID#: 030179440

Your commitment will remain anonymous and if you would like to change this at some point in the future, please let me know. Professor Jones is still beaming since you requested to make this commitment in his honor. He invites you to visit his classes at any time.

Finally, in appreciation of your support, the University will name the conference on the first floor of Grasse Mount: "the Ima Donor Conference Room." It was wonderful hearing your stories of living in Grasse Mount while you were a student and our student-callers will enjoy hearing that story, too.

I hope this letter captures everything we discussed and, if so, please sign below and return a copy to me. As always, please feel free to contact me at any time. We look forward to seeing at Homecoming and Family Weekend next year.

Sincerely,

Ray Zerr
Ray Zerr

RZ/slc 91919

Ima Donor

Signature

Ima Donor

Print Name

10/2/06

Date