

Gift Agreement

Prepared for _____ Augsburg ID _____
 Gift Amount _____

- No restrictions
- Restricted purpose _____

- Endowment – original gift to remain in perpetuity with distributions based on Augsburg’s spending policy. Distributions are to be used for _____

- I/we have received and reviewed a copy of Augsburg’s gift acceptance policies and agree to the terms of these policies.
- Augsburg may announce and/or publish this gift as a way of encouraging others to join in supporting the University.
- My/our name may be identified with this gift for internal gift reporting only, and will otherwise remain anonymous.

This gift will be fulfilled (check all that apply):

- Immediately
- Over time
- In the future

If some or all of this gift will be fulfilled over time, please share your fulfillment plan.

Gift Month/Year	Amount	Comments

Signature(s): _____ Date: _____

_____ Date: _____

Thank you for your generosity and commitment! Please return this form to Augsburg Advancement, Campus Box 142, 2211 Riverside Avenue, Minneapolis, MN 55454 or by email to Vice President Heather Riddle at riddle@augsborg.edu.

This is not a binding legal obligation upon the donor(s) or his/her/their estate as to the value or receipt of the provision(s) herein revealed and described. All information remains strictly confidential.

- Some or all of this gift will be fulfilled in the future through an estate gift.
- A copy of the provision for this gift is attached or will be sent when it is executed.

Types of Future Gifts

- Bequest
 - Charitable Gift Annuity
 - Retirement Plan Assets
 - Charitable Remainder Trust
 - Life Insurance Policy
 - Other _____
-

Description of Future Gift Assets

- Cash
 - Stocks/Bonds
 - Real Estate _____
 - _____
 - _____
 - Other _____
-

Estimated Current Value

Please provide, for long-term budgetary planning purposes only, an estimate of the value of this gift as of today. It is understood that this is only an estimate and not a legally binding commitment and can be changed at any time.

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Advisers

If you would like Augsburg to add to your records contact information for one or more key advisers such as your accountant, financial planner, or attorney, please list them here.

Name _____

Relationship _____

Phone _____ Email _____

Address _____

Augsburg has my permission to contact. I recommend this professional to others.

Name _____

Relationship _____

Phone _____ Email _____

Address _____

Augsburg has my permission to contact. I recommend this professional to others.

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Donor Bill of Rights

Philanthropy is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To assure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the not-for-profit organizations and causes they are asked to support, we declare that all donors have these rights:

1. To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.
2. To be informed of the identity of those serving on the organization's governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities.
3. To have access to the organization's most recent financial statements.
4. To be assured that their gifts will be used for the purposes for which they were given.
5. To receive appropriate acknowledgment and recognition.
6. To be assured that information about their donations is handled with respect and with confidentiality to the extent provided by law.
7. To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.
8. To be informed whether those seeking donations are volunteers, employees of the organization, or hired solicitors.
9. To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.
10. To feel free to ask questions when making a donation and to receive prompt, truthful, and forthright answers.

The text of this statement in its entirety was developed by the American Association of Fund-Raising Counsel (AAFRC), Association for Healthcare Philanthropy (AHP), Council for Advancement and Support of Education (CASE), and the Association of Fundraising Professionals (AFP), and adopted in November 1993.

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