BERNIE’S BEQUEST CHALLENGE

Bernie’s Bequest Challenge is a limited gift opportunity* that generates a cash donation for qualified donors who document new or increased bequest intentions to the University of Chicago.

“Include the University of Chicago in your estate plan, and I will match a portion of your future gift—today.”

Bernie DelGiorno, AB’54, AB’55, MBA’55

HOW IT WORKS

Document your bequest by completing the bequest challenge form.

Unlock Bernie’s challenge funds (10% of the value of your bequest, up to $50K).

Watch challenge dollars affect the University’s greatest needs today.

Provide a future gift in areas that are important to you.

FOR EXAMPLE, if you provide documentation of an eligible bequest of $100,000 to the University using the challenge form, Bernie will make an outright unrestricted gift of $10,000 now.

WHAT TO DO

· Name the University in your will or trust or as the beneficiary of an IRA, life insurance policy, or financial account.

· Choose a specific amount or a percentage of your estate.

· Consult the Office of Gift Planning and your attorney for assistance with bequest language.

· Complete the Bequest Challenge form and return it to us with the required documentation.

DO MORE WITH YOUR BEQUEST

BEQUESTS from generations of thoughtful planned-gift donors continue to sustain the long-term financial stability and leadership role of the University today.

BERNIE’S GENEROUS CHALLENGE offers you the chance to leverage your future gift (at no cost to you) and have an immediate impact on the University.

*Some restrictions and criteria apply. Documentation is required in order to qualify. Bequest gift values greater than $500,000 generate a maximum of $50,000 in challenge funds. Challenge funds are allocated to the University as unrestricted. Program remains active for as long as the challenge funds are available.