

Holy Cross

Leave a Legacy at Holy Cross

Including College of the Holy Cross in your personal legacy contributes to our financial strength and ability to effectively carry out our mission. If you have already made a provision to include Holy Cross in your estate plans, please consider notifying us by completing and returning this document. It is important to us to ensure that we have accurately recorded your intentions for the use of your gift and to recognize your generous support.

I/we have provided for the future of Holy Cross through a provision in my/our estate plans in the following way:

- | | |
|--|---|
| <input type="checkbox"/> College of the Holy Cross is in my/our will or living trust | <input type="checkbox"/> Charitable remainder trust |
| <input type="checkbox"/> Retirement plan beneficiary designation | <input type="checkbox"/> Charitable lead trust |
| <input type="checkbox"/> Charitable gift annuity | <input type="checkbox"/> Gift of real estate or personal property |
| | <input type="checkbox"/> Life insurance beneficiary |

While not required, you may wish to include a copy of the relevant portion of related documents with this form.

- I/we would be pleased to be part of the College of the Holy Cross The 1843 Legacy Society Recognition name(s) for The 1843 Legacy Society.

Listing: _____

- I/we prefer to be anonymous.
- I/we are not able to consider this type of support at this time but may in the future.
- I/we would appreciate more information about _____

Name/s (please print): _____

Address: _____

Phone: _____ Email: _____

Contact information – representative of my estate:

Name: _____ Role: _____

Phone: _____ Email: _____

College of the Holy Cross

One College Street, Holy Cross, MA 01610 | EIN: #04-2103558

The information you provide will remain completely confidential unless you authorize College of the Holy Cross to publicize your gift. College of the Holy Cross understands that all bequest provisions are revocable and any intentions stated here are not binding on you or your estate.

Holy Cross

Gifts of Life Insurance

Make College of the Holy Cross a Beneficiary of Your Life Insurance

Making a gift of life insurance allows you to transfer ownership of a paid-up life insurance policy to College of the Holy Cross. Holy Cross elects to cash in the policy now or hold it.

HOW YOU BENEFIT FROM A GIFT OF LIFE INSURANCE

- Make a gift using an asset that you and your family may no longer need.
- Receive an income tax deduction equal to the cash surrender value of the policy.
- You may be able to use the cash value of your policy to fund a gift that delivers income, such as a planned gift annuity.