



For others. Forever.

BEQUEST INTENTION

I/We _____ Class/Parent Year(s) _____
confirm that I/we have made arrangements for following gift to the College of the Holy Cross:

GIFTS (check all that apply)

- Cash IRA Real Estate Art/Collectibles
 Life Insurance ___ Whole Life ___ Universal Life ___ Term Life
 Investment/Bank Account Transfer on Death Other
 Will Living Trust Charitable Remainder Trust

A good-faith estimate of today's value of my gift is \$_____

Definition of my gift: Specific dollar amount, percentage of estate, description of property, etc.

TIMING

My gift will come to the College

- After my death. After both my spouse/partner and I are deceased.

MEMBERSHIP Membership in the 1843 Legacy Society is automatically granted to anyone arranging for a gift to come to the College through an estate. There is no minimum gift amount or age required to become a member.

- I would like my name to appear in the 1843 Legacy Society lists as follows:

 I would like the name of my spouse/partner to appear as:

 Please keep my name anonymous for purposes of the 1843 Legacy Society membership.

DOCUMENTATION

- In order to determine whether I am eligible for campaign or reunion credit, I have attached page of my will, trust, beneficiary designation form, or other such instrument as evidence of my intention to make this gift to the College. See back for requested documentation.

DESIGNATION

I hereby designate my gift for the general purposes of the College unless I have stated a designation in my estate plan, Letter of Intent or Statement of Understanding.

I agree to notify the College if my plans change so there is no gift for Holy Cross in my estate. This Bequest Intention is not a pledge nor is it legally binding on me, my heirs, or my estate.

Signature(s)

Date

Requested Documentation to Receive Credit
Now for Your Future Gift

In order to properly utilize your eventual estate gift, as well to ensure that you receive individual, class, and reunion credit (as applicable) for your future gift, the College of the Holy Cross requests that you provide written documentation along with the signed ***Bequest Intention*** form.

Documentation may be submitted in the form of mailed photocopies, or emailed scans, computer screenshots, and legible photographs (including by cell phone) of estate-related documents that detail your future intention to support the College of the Holy Cross. After reviewing the submitted documentation, the College's Office of Gift Planning will notify you of your eligibility for donor credit to be awarded during your lifetime.

Please note – The College fully respects the private and confidential nature of your estate plan. References to other beneficiaries may be redacted on the paperwork you provide to Holy Cross.

To properly record your intention, the College respectfully requests the following documentation:

1. This Bequest Intention form, completed and signed on the opposite side; and
2. Documentation of your Intended Gift to the College
(needed materials for each specific form of future gift)

Bank Account

Copy of beneficiary page/statement and current account statement for percentage gifts

Charitable Remainder Trust

Copy of the trust and current trust account statement

Donor Advised/Charitable Fund

Copy of the beneficiary statement (downloaded or photographed) and current account statement for percentage gifts

Family /Private Foundation

Letter from donor indicating the amount requested from the foundation.

Investment Account

Copy of beneficiary statement and current account statement for percentage gifts

IRA/Retirement Account

Copy of beneficiary page/statement and current account statement for percentage gifts

Life Insurance Policy

Copy of beneficiary designation, and current policy statement indicating death benefit and any outstanding loans.

Will, Marital or Testamentary Trust

Copy of the page indicating the dollar amount or percentage gift to Holy Cross

Questions? Email the Office of Gift Planning at forothersforever@holycross.edu or call 508-793-3481.