



# Wagner College Estate Intention Form

This is a confidential record. In order that we may include you in The Heritage Society, value your future gift for any campaign purposes and properly thank you and acknowledge your gift, please fill out the following information which applies to your future gift of a bequest through your Will or Trust.

Constituency:  Alumnus/a  Parent  Friend  Other \_\_\_\_\_

Donor Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_ E-mail: \_\_\_\_\_

- I understand that listing this gift may be an incentive for others to give and I am willing to be publicly acknowledged.
- I prefer not to be listed or acknowledged publicly.

## TYPE OF PROVISION:

### I. WILL/TRUST

- My Will/Trust was signed on: \_\_\_\_\_.
- My Will/Trust provides that \_\_\_\_\_ % shall be bequeathed to Wagner College through my estate. As of today's date, I estimate that the value of this provision in my estate plan would be approximately \$\_\_\_\_\_.
- My Will/Trust provides that \$\_\_\_\_\_ shall be bequeathed to Wagner College through my estate.
- My Will/Trust provides that certain items of real or personal property shall be bequeathed to Wagner College through my estate. The items are as follows:

\_\_\_\_\_  
\_\_\_\_\_

As of today's date, I estimate these items to be worth approximately \$\_\_\_\_\_.

- My Will/Trust indicates that the bequest through my estate is unrestricted.
- My Will/Trust directs Wagner College to use my bequest through my estate for a specific purpose. The specific purpose is as follows:

\_\_\_\_\_  
\_\_\_\_\_

### II. LIFE INSURANCE POLICY / IRA / OTHER (please describe the conditions and terms)

\_\_\_\_\_  
\_\_\_\_\_

I understand that I am not making a legal, or binding, commitment upon my estate by submitting this Estate Intention Form. Further, Wagner College should understand that the size of my future gift might be significantly different from the amount estimated above for the purposes of valuation in any campaign. If for any reason in the future Wagner College is no longer included in my estate plan, I will notify you so that you can update your records and remove me from the Heritage Society.

Donor Signature: \_\_\_\_\_ Date: \_\_\_\_\_