WELLESLEY COLLEGE
DEVELOPMENT OFFICE

Bequest Intention Form for Gift Credit

Name(s) Class Year (or date of birth)

In appreciation of Wellesley College and with the desire to contribute to its continued strength and success, I/we have executed and, barring unanticipated changes in circumstances, intend to keep in effect a valid provision in my/our estate for the College. I understand that I am eligible for gift credit for my bequest intention because I have celebrated my 50th reunion or I will celebrate my 50th reunion in the next 5 years. (Age 72 and older also receive gift credit for documented bequest intentions.)

A conservative estimate of the current value of my/our bequest is $ ______________________________ ($10,000 minimum)

Description of type of provision: e.g., specific dollar amount, percentage of estate/property, description of gift property, designation, etc.

My/our bequest intention is made through the following:

WILL
○ Bequest in a will

TRUST
○ Gift in a living trust
○ Charitable remainder trust

OTHER
○ Retirement plan assets [e.g., IRA, 401(k), 403(b)]
○ Life Insurance
○ Other ________________________________

○ Attached is a copy of the relevant document naming Wellesley College as a primary beneficiary: e.g., pages of will or trust referencing Wellesley College, beneficiary designation form from life insurance or retirement plan. For privacy purposes, please feel free to redact other beneficiaries as you wish.

I/we wish for this gift to be anonymous, such that our names will never be published by the College in connection with bequests: YES ○

I/we understand that Wellesley College will consider this commitment and may use this information to plan for its educational program on the basis of this provision. If my intentions change, I/we will inform the College.

_________________________ __________________________
Signature Date

_________________________ __________________________
Signature Date

Please return this form and relevant documents to:
Office of Gift Planning
106 Central Street
Wellesley, MA 02481
781-283-2235
giftplanning@wellesley.edu

10/18/2022