

WELLESLEY
OFFICE OF GIFT PLANNING

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 a valid provision in my/our estate for the College. A conservative estimate of the current value of my/our bequest is:

Specific dollar amount bequest: \$ _____

Percentage bequest: % _____; estimated current value of percentage is \$ _____.

Designation: _____.

My/our bequest intention is made through the following:

Will Trust Life Insurance Donor Advised Fund

Retirement plan assets [e.g., IRA, 401(k), 403(b)] Other Account

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 or donor advised fund. **For privacy purposes, please feel free to redact other beneficiaries as you wish.**

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

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 intentions change, I/we will inform the College.

Signature _____ Date _____

Signature _____ Date _____

Optional: Please provide contact information of an executor, power of attorney, professional advisor, relative or close friend:

Name: _____ Tel: _____ email: _____

Address: _____

Please return this form and relevant documents to:

Office of Gift Planning
106 Central Street
Wellesley, MA 02481
781-283-2235 giftplanning@wellesley.edu

8/19/2024

