



Estate Gift Intention Form

This is a confidential record and will be maintained strictly in the Knox College Office of Advancement. In order that we may include you in the **Old Main Society**, value your gift for reunion gift campaign purposes if you wish*, and properly acknowledge your commitment to Knox, we ask that you provide us with the following information.

I. DONOR STATEMENT AND RECOGNITION PREFERENCE

I understand that I am not making a legal or binding commitment upon my estate by submitting this Estate Gift Intention Form. Further, Knox College should understand that the size of my future gift might be significantly different from the amount estimated below. If for any reason in the future Knox College is no longer included in my estate plan, I will notify the College so that my records can be updated.

_____ I look forward to talking with you about this gift intention. I understand that listing this gift maybe an incentive for others to give and I am willing to be publicly acknowledged as a member of the **Old Main Society**.

_____ I understand you would like to contact me and I would be happy to discuss this gift intention with you; however, I prefer that my membership in the **Old Main Society** not be listed or acknowledged publicly.

_____ I prefer to remain anonymous and request no contact or acknowledgment.

II. ESTATE DOCUMENTATION

My Will/Trust was signed on _____.

My Will/Trust provides that:

_____ 1. _____% shall be bequeathed to Knox College through my estate. As of today's date, I estimate that the value of this provision in my estate plan would be approximately \$ _____, **OR**

_____ 2. \$ _____ shall be bequeathed to Knox College through my estate, **OR**

_____ 3. Certain items of real or personal property shall be bequeathed to Knox College through my estate. The items are as follows:

As of today's date, I estimate the approximate value of the item(s) to be \$ _____.

_____ The bequest in my Will/Trust is unrestricted, to be used as the trustees deem best.

_____ My Will/Trust directs Knox College to use my bequest for a specific purpose **OR** I would like to discuss how my bequest can be used for a specific purpose.

III. OTHER ESTATE PLANNING DOCUMENTS

I have named Knox College as the beneficiary of:

- _____ 1. An Individual Retirement Account (IRA) or other retirement plan account.
- _____ 2. A life insurance policy.
- _____ 3. An investment account.
- _____ 4. A charitable remainder or lead trust of which the trustee is _____
- _____ 5. I have not designated Knox College as a beneficiary for any of the above, but I would like information on how to do so.

IV. OTHER WAYS TO HELP KNOX COLLEGE

I would be interested in discussing additional opportunities to assist Knox College **and** receive certain income and tax benefits during my lifetime through the use of:

- _____ 1. A charitable gift annuity.
- _____ 2. A charitable remainder trust.
- _____ 3. A charitable lead trust.
- _____ 4. I'm not sure what these are, but if they can help me receive more income, save on taxes **and** help Knox College in the future, then I'd like to learn more about them. Please send me some information.
- _____ 5. A gift of appreciated securities or real estate.

V. DONOR INFORMATION AND SIGNATURE

NAME: _____ CLASS OF _____

SPOUSE: _____ CLASS OF _____

ADDRESS: _____

CITY: _____ ST: _____ ZIP: _____

PHONE: _____

EMAIL: _____

SIGNATURE: _____ DATE: _____

* - An irrevocable planned gift given during the course of a class reunion gift campaign (the 16-month period prior to the class milestone reunion at Homecoming) can be included in the campaign gift total.

For more information on planned giving, please visit www.knox.edu/legacygiving.

KNOX COLLEGE THANKS YOU FOR YOUR SUPPORT