



Personal and Confidential Heritage Society Letter of Intent

Membership in the Heritage Society is reserved for individuals who have made a provision for Alverno College in their estate plans.

I/We have provided for Alverno College's future through the gift plan checked below:

- | | |
|--|---|
| <input type="checkbox"/> bequest provision in my/our will or living trust | <input type="checkbox"/> charitable remainder trust |
| <input type="checkbox"/> life insurance beneficiary designation | <input type="checkbox"/> charitable lead trust |
| <input type="checkbox"/> retirement plan or IRA beneficiary designation | <input type="checkbox"/> charitable gift annuity |
| <input type="checkbox"/> life insurance policy naming Alverno College as owner and beneficiary (copy attached) | <input type="checkbox"/> deferred gift/estate note |
| <input type="checkbox"/> additional details concerning your gift: _____ | |

(Attachments describing your gift are welcomed in addition to that section of the will or trust in which Alverno College is mentioned.)

I/We wish to direct my/our support to the following:

- Where the needs are greatest
- Other, restricted to a specific program, project, scholarship, etc: _____

Estimated value of your gift \$ _____ Date _____

- I/We give permission to list my/our name(s) as a member(s) of the Heritage Society with the understanding that the amount on my/our arrangement will be strictly confidential.

Name of donor (and of spouse, unless requested otherwise) to be placed on certificate and on the annual report listing

- I/We prefer to remain anonymous concerning my/our planned gift.

Date

Signature

Signature

This document is for our records only -- it is not a legal obligation. We acknowledge that, in the case of a revocable commitment, your intent can be revised at any time at your own discretion. However, this information will help us plan for the future and ensure that your charitable wishes are understood and properly fulfilled.