

VASSAR

Estate Commitment Notification Form

I want to support VASSAR by including the College in my estate plan as follows:

SECTION 1: DONOR INFORMATION

Name _____ Class Year _____
Address _____ Birthdate _____
_____ Phone _____
Email _____

SECTION 2 TYPE OF ESTATE COMMITMENT (PLEASE CHECK ALL THAT APPLY)

Gift Type:

- Will or Trust provision
 IRA or Retirement Plan beneficiary
 Life Insurance beneficiary
 Other _____

Vassar will receive this gift:

- Upon my death
 Upon the death of my surviving spouse/partner
 Other

My gift is stated as:

- A specific dollar amount:
 A percentage _____% of estate/account: The estimated current value of this percentage is: \$ _____
 Other (i.e. gifts of tangible personal property) _____

SECTION 3: SUPPORTING DOCUMENTS

Attached (only one of the following is requested):

- A copy of the will or trust provision pertaining to Vassar College, including front and signature pages.
 A copy of the retirement account/insurance beneficiary designation form and summary page from a recent statement.
 A letter from my attorney, executor, or trustee.
 Other _____

SECTION 4: GIFT DESIGNATION

I would like my gift to support

- Vassar's greatest needs
 Scholarships
 Please contact me to discuss how my gift could be designated

SECTION 5: GIFT AND DONOR RECOGNITION

- I authorize the College to use my name and gift in any gift recognition publications.*
 I would like to be recognized as a member of the Matthew Vassar Legacy Society.

* amount of gift will never be disclosed



SECTION 6: ESTATE CONTACT INFORMATION

Who would you like Vassar to contact upon your death to facilitate the distribution of your gift?

- Executor Trustee IRA Custodian/Plan administrator Family Member Other

Name _____

Business _____

Address _____

Email _____

Phone _____

COMMENTS

DONOR SIGNATURE

DATE

Vassar recognizes that this gift is subject to change depending on personal or economic circumstances. This form is not intended to be a legally binding pledge. The information you provide will remain confidential.