



## Washington and Lee University Bequest Recognition Form

*(Confidential)*

\_\_\_\_\_  
Name(s)

\_\_\_\_\_  
Class Year

\_\_\_\_\_  
Date

In appreciation of Washington and Lee University and with the desire to contribute to its continued strength and success, I/we have executed and intend to keep in effect a provision in my/our estate plan for the university.

A conservative estimate of the current value of my/our provision is \$ \_\_\_\_\_

**Attached is a copy of the relevant document naming Washington and Lee as primary beneficiary**

For example, the page of your will or trust mentioning Washington and Lee, the beneficiary form from your life insurance or retirement plan.

My/our provision is made through the following planned gift:

### BEQUEST

☐ Bequest in a will

### TRUST

- ☐ Bequest in a living trust
- ☐ Charitable remainder trust
- ☐ Charitable lead trust

### OTHER

- ☐ Retirement plan assets [e.g., IRA, 401(k), 403(b)]
- ☐ Life Insurance
- ☐ Other \_\_\_\_\_

*Continued on back*

All bequest documentation will be kept confidential in accordance with the university's policies, procedures, and practices.

**On occasion, names of donors who have documented bequests may be listed in university reports or shared with class leadership.** No bequest dollar amount will be directly associated with a donor's name. Documented bequest dollar amounts will be aggregated and included in overall class totals at reunions.

Please state your preference:

- ☐ I/we give Washington and Lee permission to publish my/our name(s) in university reports and share with class leadership as having documented a bequest intention for the university and have our bequest intention figure included in aggregate totals.
- ☐ I/we prefer for this gift to be anonymous in that my/our name(s) will never be published in any university reports or shared with class leadership as having documented a bequest intention for the university—however, I/we wish that my/our bequest intention figure be added to aggregate totals.

If my intentions change, I/we will inform the university.

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Signature

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Date

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Signature

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Date

Please return this form and relevant documents to:

Jamie M. Killorin  
Director of Gift Planning  
Washington and Lee University  
204 W. Washington Street  
Lexington, VA 24450