



Washington and Lee University Revocable 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 _____

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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.

Signature

Date

Signature

Date

Please return this form and relevant documents to:

Jacqueline Painter
Associate Director of Gift Planning
Washington and Lee University
204 W. Washington Street
Lexington, VA 24450