

Planned Giving Statement of Intent



Name(s)

Class Year

Address

I/we want to make Washington and Lee University aware that I/we have provided for the University through a planned or deferred gift.

My/Our planned gift is in the form of a:

- ☐ Bequest in a will
- ☐ Bequest in a living trust
- ☐ Charitable remainder trust
- ☐ Charitable lead trust
- ☐ Retirement plan assets [e.g., IRA, 401(k), 403(b)]
- ☐ Life Insurance
- ☐ Other (please describe): _____

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

Attach a copy of the relevant document naming W&L as a beneficiary.

For example, the page of your will or trust mentioning W&L, the beneficiary form from your insurance or retirement plan.

Gift Designation:

- ☐ Unrestricted
- ☐ Restricted (please indicate purpose): _____
- ☐ This expression of intent to support the University through a planned gift is made in honor of the class of _____

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.

continued on back

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 Gift Planning Office.

Signature: _____ Date: _____

Return this form and relevant documents to:

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

Questions? Contact Jacqueline at 540-458-8429 or jpainter@wlu.edu

Washington and Lee University recommends that all persons considering a planned or deferred gift consult with their professional advisors. Also, the University encourages alumni and friends to discuss their plans with staff to ensure their wishes are understood and that W&L can comply with those wishes.