# Planned Giving
# Statement of Intent

The Campaign for Washington and Lee

_____ _____

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): _____

Name of Trust or Plan Administrator: _____

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 (Required).**
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.*

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**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.

□ I/we prefer for this gift to be anonymous. My/our name(s) will not be published in any university reports.

If my intentions change, I/we will inform the Gift Planning Office.

Signature: _____ Date:_____

Spouse/Partner: _____ Date:_____
Signature (if applicable)

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 as well as university staff to best meet philanthropic goals and while optimally serving W&L long into the future.