Williams Today & Tomorrow

A special plan to provide 50th Reunion gift credit for legacy gifts by pairing them with a current gift. The estate plan portion of your gift can be a bequest intention specified in your will or trust, or it can be a beneficiary designation in a retirement account, donor advised fund, or life insurance policy. Many donors make their bequests using an IRA to take advantage of income tax benefits.

The "Today" portion of the commitment can be an outright gift or a pledge to be fulfilled within the next five years. It can be your annual gift to the Alumni Fund or an additional gift to a 50th Reunion class gift purpose or any other endowed fund.

Alumni are eligible for the Today & Tomorrow plan after their 45th Reunion. There is no minimum amount for this gift. **All pledges are non-binding.**

Your bequest intention will make you a new member or reaffirm your membership in **The Ephraim Williams Society**.

HOW TO PARTICIPATE

1. Begin with a conversation with the Gift Planning Office.
2. Between your 45th and 50th Reunions, complete a "Williams Today & Tomorrow" pledge form and list your gift purpose(s).
   - Complete the "Today" pledge portion for your current gift (over a period of up to five years) unless you have already made a qualifying current "Today" gift (in which case, simply note that on the form).
   - Complete the "Tomorrow" pledge portion with details on your bequest intention
3. Provide Williams staff with copies of your "Tomorrow" supporting bequest documentation (excerpt from will or trust or a beneficiary designation form.)
4. Share with Williams staff the contact information of your legal counsel, executor, trustee, retirement plan administrator, and or family member.

STARTING AT THE 55TH REUNION

Donors are eligible for remaining 25% gift credit for a bequest intention (more credit if they've made an addition, the value of the bequest has increased, or if the original bequest intention is satisfied with outright gifts).

TODAY	TOMORROW
Outright gifts of cash, appreciated securities, or an IRA qualified charitable distribution, etc.	Documented bequest intentions can be from a will, trust, retirement plan, life insurance policy, or donor advised fund, etc.
Gifts can be made toward a 50th Reunion class gift purpose, a different endowed fund, or the annual Alumni Fund.	Can be designated toward a 50th Reunion class gift pupose or a different endowed fund.
Receive a federal income tax charitable deduction for the year(s) in which you make your gift(s) (to the extent allowable by law) and gift credit for the 100% of your "Today" gift/pledge.	The bequest intention will generate gift credit of 75% of the face value of a specific bequest amount or 75% of the current value of a percentage bequest.
Five-year pledge is encouraged through a non-binding statement of intent	It can be a joint bequest, as long as both spouses are at least age 65. If a non-alum spouse is younger than that, college staff are happy to discuss options.

Office of Gift Planning
75 Park Street
Williamstown, MA 01267
413-597-3538
gift.planning@williams.edu

Williams
50th Reunion Program

Williams Today & Tomorrow: Bequest Intention

CONFIDENTIAL

NAME(s):

CLASS/AGE:

STREET:

CITY:

STATE:

ZIP:

HOME PHONE:

MOBILE:

EMAIL:

Williams is a beneficiary of my:

- ☐ Will or revocable trust
- ☐ Charitable remainder trust
- ☐ Retirement plan: (tax advantageous)
- ☐ Life insurance policy:
- ☐ Donor advised fund:

Williams is designated as a:

- ☐ Primary Beneficiary
- ☐ Secondary beneficiary

Other (please specify):

For a:

Specific dollar amount: $

A percentage or estate/account: %

Estimated current value of this percentage:
$

75% of the value of my bequest intention will count in my 50th Reunion and fundraising totals as: $

Williams will receive this gift:

- ☐ Upon my death
- ☐ Upon the death of the surviving spouse

I have made a "Today" gift/pledge as follows:

"Tomorrow" gift purpose (please select one):

- ☐ Unrestricted (supports highest priorities)
- ☐ General unrestricted endowment
- ☐ Class 50th Reunion Fund gift purpose
- ☐ Restricted for the following preferred purpose

This future gift qualifies me for membership in The Ephraim Williams Society:

- ☐ Please list me as a member. My name should appear in print as:
- ☐ I am a current member.
- ☐ I wish to be an anonymous member.
- ☐ I do not wish to be a member.

Please provide contact information of a professional advisor, executor, Power of Attorney, relative, or close friend:

Name:

Class: (if applicable)

Address:

Tel:

e-mail:

☐ I acknowledge that the information above and the **attached bequest documentation** (e.g. relevant provision of will or trust, beneficiary designation form, etc.) correctly demonstrates my bequest intention to Williams. If I make changes that affect this bequest intention I will inform the college in writing so as to keep my intentions current. In addition, I acknowledge that this commitment is not intended to be a legally binding pledge.

Signature: **Date:**

Printed Name:

Signature: **Date:**

Printed Name:

Please return signed and supporting documentation to:

Williams College
Office of Gift Planning
75 Park Street, Williamstown, MA 01267
Email: gift.planning@williams.edu Fax: 413- 597-4039