



## Bequest Intention

Starting at your 55th Reunion, Williams will recognize, honor and celebrate your legacy gift

**WHO:** Alumni in their 55th Reunion year and beyond, plus spouses, families and friends age 75 and older are eligible.

**WHAT:** Documented bequest intentions can be from a will, trust, retirement plan, life insurance policy, or donor advised fund, etc. It can be a joint bequest, as long as both spouses are age eligible. Your bequest intention will make you a new member or reaffirm your membership in [The Ephraim Williams Society](#).

[The Ephraim Williams Society](#) honors alumni, families, and friends who have demonstrated their commitment to Williams' future by establishing planned gifts or including the college as a charitable beneficiary of their estate plans.

**WHY:** Through your estate plans you can carry on the legacy of philanthropy that began with our founder, Ephraim Williams in 1793. Your bequest intention supports future students and professors, continues the generosity that came before you, and serves as an example to other alumni. In addition, the college will have the opportunity to acknowledge, thank, and celebrate your future gift now.

**How:** Complete a Bequest Intention Form (see reverse) and provide supporting documentation (e.g. excerpt from will, trust, or beneficiary designation form).

**QUESTIONS?** Williams College  
**CONTACT:** Office of Gift Planning  
75 Park Street  
Williamstown, MA 01267

PHONE: 413.597.3538  
EMAIL: [gift.planning@williams.edu](mailto:gift.planning@williams.edu)



# Declaration of Bequest Intention

**CONFIDENTIAL**

**NAME(s):**

**CLASS/AGE:**

**STREET:**

**CITY:**

**STATE:**

**ZIP:**

**HOME PHONE:**

**MOBILE:**

**EMAIL:**

**Williams is a beneficiary of:**

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):

Specific dollar amount:

A percentage or estate/account:  
Estimated current value of this  
percentage:

**Williams will receive this gift:**

Upon my death

Upon the death of the surviving spouse

**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.

**Future Use of Funds (according to  
attached bequest documentation):**

Unrestricted (supports highest priorities)

General unrestricted endowment

Restricted for the following preferred purpose:

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

**Name(s):**

**Class:**  
(if applicable)

**Address:**

**Phone:**

**email:**

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 as of the date signed. 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**

**Signature:**

**Date**

**Printed Name:**

**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