



# 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 of any size 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 Legacy Society](#).

[The Ephraim Williams Legacy 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 my/our :

Will or revocable trust

Charitable remainder trust

### Williams is designated as a beneficiary of my/our:

Retirement plan  
(tax advantageous)

Donor advised fund

Other (please specify):

Life insurance policy

### as a:

Primary beneficiary

Secondary beneficiary

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 Legacy 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 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](mailto:gift.planning@williams.edu) Fax: 413- 597-4039