

Williams Bequest Intention



A bequest intention can help you make a larger reunion gift than you might have thought possible because it allows you to retain control of your assets during your life. Many donors make their bequests using an IRA to take advantage of income tax benefits. There is no minimum amount for this gift. All pledges are non-binding.

We still ask that you consider a gift today to support the Alumni Fund, the 50th Reunion class gift purpose(s), and/or a special endowed fund of your choosing. It can be an outright gift or a pledge to be fulfilled within the next five years. It can be your annual Alumni Fund gift, support a 50th Reunion class gift purpose or any other endowed fund. Use our separate Statement of Intent form on the reverse to capture your future gift.

In addition to bequest intentions, there are other gift planning options that can provide tax advantages. For example, funding a life income gift such as a charitable gift annuity or charitable remainder unitrust. Contact the Gift Planning Office to learn more about those options.

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

HOW TO PARTICIPATE

1. Begin with a conversation with the Gift Planning Office.
2. Make a current gift or pledge before the 50th Reunion on a separate Statement of Intent.
3. Make a future gift by including Williams in your estate plan.
 - Provide Williams staff with supporting documentation for your bequest intention (excerpt from will or trust or a beneficiary designation form.)
 - Complete the form on the reverse. Including sharing contact information for a trusted advisor.

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

Outright gifts of cash, appreciated securities, IRA qualified charitable distribution, and more.

Any current gift or 5 year pledge including Alumni Fund, 50th Reunion class gift purpose or other agreed upon gift purpose.

Receive a federal income tax charitable deduction when you make your gift(s) (to the extent allowable by law) and your class receives gift credit for 100% of your current gift/pledge.

Five-year pledge is encouraged through a non-binding statement of intent

TOMORROW

Documented bequest intentions can be from a will, trust, retirement plan, life insurance policy, health savings account, or donor advised fund, etc.

Can be designated toward a 50th Reunion class gift purpose or other agreed upon gift purpose.

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.

It can be a joint bequest, as long as both spouses are at least age 65. If a spouse is younger than that, college staff are happy to discuss options.



Williams Bequest Intention

CONFIDENTIAL

NAME(s):

CLASS/AGE:

PHONE:

Williams is a beneficiary of my:

Will or revocable trust

Charitable remainder trust

Retirement plan: Life insurance policy:
(tax advantageous)

Donor advised fund:

Williams is designated as a:

Primary Beneficiary

Secondary beneficiary

Other (please specify):

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

I am already member.

I would like to be a member. Please list my name in print as:

I wish to be an anonymous member.

I do not wish to be a member.

For a:

Specific dollar amount: \$

A percentage of estate/account: %

Estimated current value of this percentage:
\$

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

Please provide contact information of a professional advisor, executor, power of attorney, relative, or close friend:

Name:

Class:
(if applicable)

Address:

Phone:

e-mail:

Williams will receive this gift:

Upon my death

Upon the death of the surviving spouse

Bequest gift purpose (according to attached documentation):

Unrestricted (supports highest priorities)

General unrestricted endowment

50th Reunion Fund

Restricted for the following preferred purpose

By signing this form, I acknowledge the following:

- My attached bequest documentation (e.g. relevant provision of will or trust, beneficiary designation form, etc.) correctly states my bequest intention to Williams including **specifically stating the intended gift purpose.**
- If I make changes that affect this bequest intention I will inform the college in writing so as to keep my intentions current.
- I acknowledge that this commitment is not intended to be a legally binding pledge.

If you choose more than one purpose, please indicate the appropriate percentage for each purpose in the box above.

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**