



# Middlebury Institute of International Studies at Monterey

## Confidential Statement of Gift Intention

### Type of Gift and Provision

I/We have named Middlebury Institute of International Studies (hereinafter referred to as Middlebury) as a beneficiary of my/our:

- Will or living trust
- Donor-advised fund (DAF)
- Other (please specify): \_\_\_\_\_
- Life insurance policy
- Retirement account: (IRA, Roth, 401k, 403b, etc.)
- Charitable remainder trust or lead trust

Good faith estimate of the value: \$\_\_\_\_\_

Percentage of estate/account: \_\_\_\_\_%. If based on a percentage, please estimate the current value of the gift to Middlebury: \$\_\_\_\_\_

Executor/Trustee: \_\_\_\_\_

Address/Phone: \_\_\_\_\_

Middlebury will receive this gift:  Upon my death  Upon the death of my surviving spouse/partner  Other

### Gift Purpose

This bequest is for:  General educational purposes  Other (scholarship, etc.): \_\_\_\_\_

### Supporting Documents

I/We attach the following (optional):

- A copy of the pertinent section of my/our will or trust pertaining to Middlebury
- A copy of the beneficiary designation form from my/our retirement account, life insurance policy, or DAF
- A letter from my/our attorney, executor, or trustee
- Other

### Legacy Society

The Legacy Society recognizes alumni, parents, and friends who have included Middlebury in their estate plans or established life-income gifts. Middlebury honors our members through special recognition and invitations to Legacy Society events.

Middlebury understands this gift is subject to change and is not intended to be a legally binding pledge. Information you provide will remain confidential.

_____	_____	_____	_____
Name	Signature	Class Year	Date
_____	_____	_____	_____
Spouse's Name	Spouse's Signature	Date	



## Frequently Asked Questions

### **What is a bequest intention?**

A bequest intention is a gift Middlebury will receive at some future date. You designate Middlebury to receive a benefit from your will(s) trust, retirement plan, life insurance policy, commercial annuity, or donor advised fund (DAF). Other gifts to be received in the future may also qualify, and we welcome your questions about them.

### **How do I determine the amount of my bequest intention if it is not a specific amount?**

If you are leaving a portion of your estate/retirement account/life insurance/DAF, please provide your best estimate of what Middlebury may expect to receive, based on today's value.

### **May I designate my bequest intention to a specific program or initiative?**

Unrestricted bequest intentions allow Middlebury to use your gift where the need is greatest when it is received. However, you may designate your bequest intention to a specific department, program, or initiative such as financial aid. You may also add it to an existing endowed fund. If you choose to restrict your bequest intention, please contact us to discuss your goals and objectives.

### **What happens if my estate cannot fulfill my bequest intention?**

This confidential statement of gift intention form is not a legally binding document; there is no formal obligation. Your commitment is not legally binding to your estate or your heirs.

### **Why share information about my bequest intention?**

Sharing information enables Middlebury to recognize and thank you. You provide an inspiring example for others to follow. It offers the opportunity to discuss and clarify your goals and objectives. By inviting you to join the Legacy Society, we aim to strengthen and maintain your connection with The Institute. The information you provide will remain confidential.

### **What happens if I change my estate plan?**

We understand your plans may change in the future. If you make changes that affect your bequest intention, we ask you inform us in writing so we can accurately reflect your plans for the Institute.

