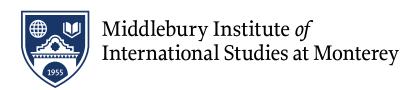


Confidential Statement of Gift Intention

Type of Gift and Provision

Spouse's Name	Spouse's Signature	Date
Name	Signature	Class Year Date
Middlebury understands this gift is sub Information you provide will remain co	ject to change and is not intended to be onfidential.	a legally binding pledge.
	parents, and friends who have included ry honors our members through special	
	Legacy Society	
	of my/our will or trust pertaining to Mic nation form from my/our retirement acc	
	Supporting Documents	
This bequest is for: General education	onal purposes 🗌 Other (scholarship, etc	:.):
	Gift Purpose	
Address/Phone: Middlebury will receive this gift: Up	on my death Upon the death of my s	urviving spouse/partner 🗌 Other
Executor/Trustee:		
Percentage of estate/account:gift to Middlebury: \$	_%. If based on a percentage, please est	imate the current value of the
☐ Donor-advised fund (DAF)	□ Life insurance policy □ Chari □ Retirement account: (IRA, Roth, 401	k, 403b, etc.)
our:	Trick is the color of the color	



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.

