



GIFT PLANNING
STATEMENT OF FUTURE GIFT INTENT
Confidential

Name UMW Class Year Date of Birth

Spouse/Significant Other's Name UMW Class Year Date of Birth

Mailing Address City State Zip

Home Phone Cell Phone Preferred Email Address

I/we have made provision(s) for the University of Mary Washington in the following manner:

Bequest through will/trust: Percentage of Estate Specific Amount \$ Stock or property (Please describe)

Beneficiary Designation: IRA or Retirement Account Life Insurance Policy Bank Account (Payment on Death) Investment Account (Transfer on Death)

Other Gift Type: Charitable Gift Annuity Charitable Lead Trust Charitable Remainder Trust

Other (please describe)

- This gift is to be unrestricted and may be used where the need is greatest at UMW
I/We wish to specify that this gift be used for the following purpose:

Today's estimated value of my/our future gift to Mary Washington is approximately \$

However, I/we understand that future fluctuations/changes in the market/economy may have an impact on this value. It is understood that the statement of intent is revocable and not legally binding on my/our estate. All information will be kept confidential. The gift amount or the current estimated value of my/our gift will be used for recognition purposes only.

Signature Date

Signature Date

- UMW may use my/our name(s) and gift details to inspire others to give Please keep my/our gift amount anonymous

Please return this form to the Office of Gift Planning, 1119 Hanover Street, Fredericksburg, VA 22401.
If you have any questions, please contact Jan Clarke at (540) 654-2064 or jclarke@uwm.edu
As a courtesy, please notify UMW if your estate plans change at any time.