



Bequest Gift Documentation Form

A bequest gift to Babson College is a wonderful way to leave a legacy. Please complete this form to ensure that your gift intentions are appropriately recognized and fulfilled. The information you provide below will be kept confidential.

Thank you for including Babson College in your estate commitments.

TYPE OF GIFT

I have included Babson College in my:

- | | | |
|---|---|---|
| <input type="checkbox"/> Bequest/will/estate plan | <input type="checkbox"/> Living trust | <input type="checkbox"/> Brokerage or savings account |
| <input type="checkbox"/> Life insurance policy | <input type="checkbox"/> Charitable remainder trust | <input type="checkbox"/> Other |
| <input type="checkbox"/> Retirement plan | <input type="checkbox"/> Charitable lead trust | |

BABSON LEGACY SOCIETY RECOGNITION

Babson is proud to recognize you as a member of the Babson Legacy Society.

- | | | |
|--|--|---|
| <input type="checkbox"/> Please include me in the Babson Legacy Society. | <input type="checkbox"/> My spouse is joining me in the Babson Legacy Society. | <input type="checkbox"/> I/we prefer to remain anonymous. |
|--|--|---|

DOCUMENTATION

- Attached is a copy of the bequest provision, relevant portion(s) of my/our will or estate plan provision, or beneficiary designation document that names Babson as a beneficiary.

VALUE

- Percentage of estate /account % _____ Estimate of current value \$ _____
- Specific dollar amount \$ _____

AREA OF SUPPORT

I/we wish to bequeath this gift to Babson College to be designated as:

- Current use support to annual unrestricted budget.
- Current use support for _____ (Example: Financial aid, faculty support and/or student life.)
- Add to my existing named fund _____.
- Support to unrestricted endowment.

Babson understands that gift intentions can change based on unexpected life events.

Donor Name _____
Donor Signature _____
Date of Birth _____

List as _____
Date _____
Preferred Phone _____

Joint Donor Name _____
Joint Donor Signature _____
Date of Birth _____

List as _____
Date _____