



## 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"/> Brokerage or savings account | <input type="checkbox"/> Life insurance policy |
| <input type="checkbox"/> Trust                    | <input type="checkbox"/> Retirement plan              | <input type="checkbox"/> Other                 |

### BABSON LEGACY SOCIETY RECOGNITION

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

- Please include me in the Babson Legacy Society.
- My spouse is joining me in the Babson Legacy Society.
- 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.
  
- This gift is revocable
- This gift is irrevocable

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

Donor Name \_\_\_\_\_  
Donor Signature \_\_\_\_\_

List as \_\_\_\_\_  
Date \_\_\_\_\_  
Preferred Phone \_\_\_\_\_

Joint Donor Name \_\_\_\_\_  
Joint Donor Signature \_\_\_\_\_

List as \_\_\_\_\_  
Date \_\_\_\_\_