



## Amherst College Bequest Recognition Form

(Confidential)

\_\_\_\_\_  
Name(s)

\_\_\_\_\_  
Class Year

\_\_\_\_\_  
Date

In appreciation of Amherst College and with the desire to contribute to its continued strength and success, I/we have executed and intend to keep in effect a provision in my/our estate plan for the College.

A conservative estimate of the current value of my/our provision is \$ \_\_\_\_\_

**Attached is a copy of the relevant document naming Amherst College as primary beneficiary**

For example, the page of your will or trust mentioning Amherst College, the beneficiary form from your life insurance or retirement plan.

My/our provision is made through the following planned gift:

**BEQUEST**

Bequest in a will

**OTHER**

Retirement plan assets [e.g., IRA, 401(k), 403(b)]

Life Insurance

Other \_\_\_\_\_

**TRUST**

Bequest in a living trust

Charitable remainder trust

Charitable lead trust

*Continued on back*

All bequest documentation will be kept in strictest confidence.

**On occasion, names of donors who have documented bequests may be listed in College reports or shared with class leadership.** No bequest dollar amount will be directly associated with a donor's name. Documented bequest dollar amounts will be aggregated and included in overall class totals at reunions.

**Please state your preference:**

- I/we give Amherst College permission to publish my/our name(s) in College reports and share with class leadership as having documented a bequest intention for the College and have our bequest intention figure included in aggregate totals.
- I/we prefer for this gift to be anonymous in that my/our name(s) will never be published in any College reports or shared with class leadership as having documented a bequest intention for the College – however, I/we wish that my/our bequest intention figure be added to aggregate totals.
- I/we prefer for this gift be totally anonymous, such that our names will never be published or shared with class leadership in connection with bequest intentions and my/our bequest intention figure will NOT be included in aggregate totals.

If my intentions change, I/we will inform the College.

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Signature

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Date

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Signature

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Date

Please return this form and relevant documents to:

Julie R. Lackner, J.D.  
Director of Gift Planning  
Amherst College  
PO Box 5000  
Amherst, MA 01002-5000