



UMass Hillel Legacy Society – Declaration of Intent

I/We \_\_\_\_\_ have:

- checkbox made provisions for UMass Hillel in my/our estate or financial plans.
checkbox not yet formalized my/our pledge, but hope to do so in the next:
checkbox 6 months checkbox 12 months checkbox 18 months

To assist UMass Hillel in long-term planning, I/we are pleased to provide the following information regarding my/our planned gift intentions, in the form of:

- checkbox Bequest checkbox Charitable Remainder Trust
checkbox IRA or Other Retirement Plan checkbox Real estate, securities, or other assets
checkbox Life Insurance Policy or beneficiary thereof checkbox Donor Advised Fund
checkbox Charitable Gift Annuity checkbox Other \_\_\_\_\_

In the amount of \$ \_\_\_\_\_ or \_\_\_\_\_ % of my giving vehicle. Please describe:

\_\_\_\_\_

My planned gift is held with the following company or institution:

\_\_\_\_\_

Assistance to provide for my/our legacy commitment is listed below (attorney, planner, executor)

\_\_\_\_\_

Contact Information

Name(s): \_\_\_\_\_ Date(s) of Birth: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Home Phone: \_\_\_\_\_ Mobile Phone: \_\_\_\_\_

Email Address(es): \_\_\_\_\_

Donor Recognition & Authorization for Use of Name - Please choose one:

- checkbox You may publish my/our names. The type and amount of the gift will remain strictly confidential. My/our name(s) should appear as:

\_\_\_\_\_

- checkbox I/We prefer to remain anonymous.

This commitment is nonbinding

Signature \_\_\_\_\_ Date: \_\_\_\_\_

Signature \_\_\_\_\_ Date: \_\_\_\_\_

Kindly attach a copy of the page/paragraph from the will, trust, beneficiary designation form, or other gift plan that describes your gift provisions and sent this signed Letter of Intent to UMass Hillel:

Legal Name: Hillel House at the University of Massachusetts Amherst, Inc.
Address: 388 North Pleasant Street, Amherst, MA 01002