



UMass Hillel Legacy Society – Declaration of Intent

I/We _____ have:

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

- | | |
|---|---|
| <input type="checkbox"/> Bequest | <input type="checkbox"/> Charitable Remainder Trust |
| <input type="checkbox"/> IRA or Other Retirement Plan | <input type="checkbox"/> Real estate, securities, or other assets |
| <input type="checkbox"/> Life Insurance Policy or beneficiary thereof | <input type="checkbox"/> Donor Advised Fund |
| <input type="checkbox"/> Charitable Gift Annuity | <input type="checkbox"/> Other _____ |

I/we estimate our planned gift amount will be \$ _____, or _____ % of the giving vehicle noted above.

My/our planned gift is held with the following company/ institution _____

Assistance to provide for my/our legacy commitment is listed below:

Name of Executor or Attorney

Mailing Address of Executor or Attorney

Email Address

Your Contact Information:

Name

Date of Birth

Partner/Spouse Name (if applicable)

Date of Birth

Street Address

City

State

Zip Code

Primary Email Address

Secondary Email Address (if applicable)

Donor Name Recognition Consent

- You may publish my/our names. (amount and gift type remain confidential).

My/our name(s) should appear as. _____

- I/We prefer to remain anonymous

This commitment is nonbinding

Signature _____ **Date** _____

Signature _____ **Date** _____

Kindly send a signed copy of this Declaration of Intent to: **UMass Hillel**
388 North Pleasant Street
Amherst, MA 01003

Please include a copy of the page/paragraph from your will, trust, or beneficiary designation form that describes your gift.