

# Bequest Intention Form

By completing this form you signify your intent to name Bates College as a beneficiary of your estate. Bates understands that all bequest provisions are revocable and that any intentions stated here are not binding on you or your estate. We are deeply grateful for your vision and generosity.

## GIFT TYPE:

- ☐ Will or trust provision
- ☐ Retirement or investment account
- ☐ Life Insurance beneficiary provision
- ☐ Other

## BATES WILL RECEIVE THIS GIFT:

- ☐ Upon my death
- ☐ Upon the death of my spouse
- ☐ Other

I estimate the total value of this gift will be  
\$ \_\_\_\_\_

*\* To facilitate our ability to honor the intentions set forth above, we would greatly appreciate a copy of your Will or Trust (or the appropriate sections thereof) for safekeeping in our confidential files. Thank you.*

## I WOULD LIKE MY GIFT TO SUPPORT:

- ☐ A college priority as determined by the Board of Trustees (unrestricted)
- ☐ An existing scholarship fund
- ☐ A department or program
- ☐ Please contact me to discuss how my gift could be used

## THIS PROVISION IS STATED AS:

- ☐ A specific dollar amount \$ \_\_\_\_\_
- ☐ A percentage of my estate/account: \_\_\_\_%  
If based on a percentage, please estimate the current value of the gift:  
\$ \_\_\_\_\_

## THE PERSON WHO WILL HANDLE MY ESTATE AFFAIRS IS:

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

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

Telephone: \_\_\_\_\_ Email: \_\_\_\_\_

## YOUR GIFT QUALIFIES YOU FOR MEMBERSHIP IN THE PHILLIPS SOCIETY



- ☐ Yes, Bates may publish my name as a member of The Phillips Society.
- ☐ I am pleased to become a member of The Phillips Society, but I wish to remain anonymous and request that my name not be published in connection with my bequest intention.

Print Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Print Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_