

Estate Commitment 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:

Unrestricted endowment

New or existing endowed fund

Name of fund _____

College priority as determined by the Board of Trustees

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- ☐ I am pleased to become a member of The Phillips Society, but I wish to remain anonymous and request that my name not be published in connection with my bequest intention.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

Top 5 Reasons to Share Your Gift Plans

1. **Peace of mind.** Sharing your estate gift plans ensures that your gift will be used exactly as you intend. We can provide information and sample language to help you and your advisor carry out your intentions. For endowed funds, such as financial aid funds or professorships, minimum gift amounts and specific language may be needed.
2. **Designating a purpose.** All gifts, including estate gifts, can be designated to any area that is important to you. Not sure how you would like your gift used? Bates staff can help you identify areas that align with your interests and passions.
3. **No obligations.** Sharing your gift with Bates does not make it binding or irrevocable—you still have the flexibility to revise your estate plan at any time if your circumstances or priorities change.
4. **It counts.** Planned gifts are a crucial source of support for Bates. While it may be difficult to predict the future value of your gift, by sharing an estimated current value, your gift can be included in the college's philanthropic goals. Providing an estimated current value of your gift can also help guide conversations with Bates staff about options for designating your gift to have the most meaningful impact.
5. **Recognition.** When Bates is aware of your gift it allows us to express our gratitude during your lifetime. It also qualifies you for membership in the Phillips Society which includes invitations to special events and personal recognition. When you share your gift plans with Bates, you get to control the frequency and type of communications you receive from us. You can also share your gift plans with us and remain anonymous if you choose.