



Estate Gift Intention Form

The information that you provide on this form is confidential and will be kept on file in the Knox College Office of Advancement. So that we appropriately acknowledge your commitment to Knox through the **Old Main Society**, please complete both pieces of Section I and return this form. If you are willing to share more details, please complete as many of the remaining sections as possible.

I. DONOR STATEMENT AND RECOGNITION PREFERENCE

I understand that I am not making a legal or a binding pledge by submitting this Estate Gift Intention Form. If for any reason in the future Knox College is no longer included in my estate plans, I will notify Knox College Advancement so that my records can be updated.

_____ I have made an estate provision to Knox College and have previously informed you of the specifics of my gift and that has not changed.

_____ I have made an estate provision to Knox College and am providing further details regarding my intended gift in the following sections of this form (see reverse side), *or*;

_____ I have made an estate provision to Knox College, but I prefer not to provide further information regarding my intended gift at this time.

_____ I am willing to have my name published as a member of the Knox College Old Main Society, which recognizes those who include Knox College in their estate plans, *or*;

_____ I prefer to remain anonymous. Please do not publish my name as a member of the Old Main Society.

Printed name (person #1)

Printed name (person #2)

Signature (person #1)

Date

Signature (person #2)

Date

II. ESTATE DOCUMENTATION

My will/trust was signed on (month/date/year) _____.

My will/trust provides that:

_____ % of the value of my estate is designated for Knox College. As of today's date, I estimate the value of this provision in my estate plan will be approximately \$ _____, *or*;

_____ \$ _____ is designated to Knox College through my estate, *or*;

_____ Specific items of real or personal property are to be gifted to Knox College through my estate. The items are as follows:

As of today's date, I estimate the approximate value of the item(s) to be \$ _____.

_____ I am including with this form copies of the appropriate sections of my will/trust. (not required)

_____ The gift to Knox College in my will/trust is unrestricted, to be used as the Board of Trustees deems most useful to Knox College, *or*;

_____ My will/trust directs Knox College to use my gift for a specific purpose, *or*;

_____ I would like to discuss how to designate my gift for a specific purpose.

III. OTHER ESTATE PLANNING DOCUMENTS

I have named Knox College as the beneficiary of:

_____ An Individual Retirement Account (IRA) or other retirement plan account.

_____ A life insurance policy.

_____ An investment account.

_____ A charitable remainder or lead trust of which the trustee is _____.

_____ I have not designated Knox College as a beneficiary for any of the above, but I would like information on how to do so.



Please return signed form to:

Attn: Scott Park
Assistant Vice President for Legacy Gifts
Knox College
2 E. South Street
Galesburg, IL 61401

For more information on income producing gifts, please visit knox.giftplans.org.