YOUR LEGACY. WESLEYAN'S FUTURE.

A practical and efficient way to make a planned gift to Wesleyan University is to include Wesleyan in your will or revocable trust, or as a beneficiary of your retirement plan or life insurance. Each individual legacy contributes to our financial strength and ability to meet the needs of our students and their families. If you have already made a provision to include Wesleyan in your financial planning, please consider notifying us by completing and returning this document.

By documenting your bequest intention, Wesleyan will have an opportunity to recognize your generous support in your lifetime.

Information provided here to signify your bequest intention to Wesleyan will remain completely confidential unless you authorize the University to publicize your gift. Wesleyan understands that all bequest provisions are revocable and any intentions stated here are not binding on you or your estate.

I have made revocable gift commitments for Wesleyan as follows:

- ☐ Bequest approximate value _____
- ☐ Life insurance policy approximate value _____
- ☐ IRA or other retirement plan approximate value _____
- ☐ Other asset approximate value _____
- ☐ I have attached documentation from my will, retirement plan, life insurance policy, or trust.

_____ _____

Signature *Date* *Signature* *Date*

_____ _____

Name (please print) *Name (please print*)

Contact information – representative of my estate:

_____ _____

Name *Role*

_____

Telephone or Email

If your gift is for a percentage of your estate, rather than a fixed amount, Wesleyan will be happy to use your good faith estimate of the current value based on this percentage. While not required, you may wish to include a copy of the relevant portion of related documents with this form.

Wesleyan University Office of Advancement | Gift Planning
mywesleyanlegacy.org | plannedgiving@wesleyan.edu
Mark Davis '96 (860) 685-3660 | Marianne Calnen (860) 685-5775