



This form is to help you provide information about your future gift to Union. By sharing this information, you help to ensure that your gift will be used as you intended.

TYPE OF GIFT

I/We have included Union College in my/our estate plans through one or more of the following planned gifts:

- Bequest in will or revocable trust for the dollar amount of \$ _____
- Bequest for % of my estate; estimated value of \$ _____
- Retirement plan beneficiary designation; estimated value of \$ _____
- Insurance policy beneficiary designation; benefit of \$ _____
- Other; estimated value of \$ _____

PURPOSE OF THE GIFT

Many donors feel most confident that their gift intention will be honored when they provide Union College with a copy of the section of the will that pertains to their gift. We welcome documentation of your gift in this way. If you prefer not to provide a copy of the bequest language, please indicate below the purpose of your gift:

- Unrestricted
- Restricted to:
 - Scholarship or
 - Specific department: _____
 - Other: _____

DONOR RECOGNITION

- List name(s) on donor honor roll as: _____
- I/We prefer to be anonymous.

Name _____ Date of Birth _____
(please print) (MM/DD/YYYY)

Signature _____ Date _____

Name _____ Date of Birth _____
(please print) (MM/DD/YYYY)

Signature _____ Date _____

Thank U for your thoughtful investment in the future of Union College. As with any decision involving your estate, we recommend that you seek the advice of professional counsel. Your signature verifies only that the above information is accurate and in no way binds you to your commitment. Further, we understand that the size of your future gift might be significantly different from the amount estimated above.

PLEASE RETURN TO:
Union College, Office of Gift Planning
807 Union Street, Schenectady, NY 12308
(518) 388-6156 | giftplanning@union.edu | Tax ID: 14-1338580