

Planned Gift Statement of Intent



I/we want to make Washington and Lee University aware that I/we have provided for the University through a planned or deferred gift.

My/our planned gift is in the form of a:

- Bequest
 Testamentary Trust
 Charitable Remainder Trust: Annuity or Unitrust
 Charitable Gift Annuity
 Beneficiary Designation
Type:
 Other (please describe): _____

Current estimated value: _____

(A good faith current estimate is all that is needed.)

My philanthropic plans for Washington and Lee are:

- Revocable Irrevocable Anonymous

Gift designation:

- Unrestricted
 Restricted (Please indicate purpose: _____
_____)

- This expression of intent to support the University through a planned gift is made in honor of the class of _____.

Name(s): _____

Address: _____

Telephone: _____

E-mail: _____

Signature: _____ Date: _____

Please note, completing this form only informs Washington and Lee of your plans. It does not obligate you in any way.

Washington and Lee University recommends that all persons considering a planned or deferred gift consult with their professional advisors. Also, the University encourages alumni and friends to discuss their plans with staff to ensure their wishes are understood and that W&L can comply with those wishes.