

Confidential Bequest Intention Form



As a Villanovan, ***you are a beneficiary of the legacy of the generations that came before you.*** Always mindful of the generations still to come, hundreds of Villanovans have been inspired to build their legacy and make a substantial impact on the lives of students. ***How will you create your legacy at Villanova?*** Use this confidential bequest intention form and ***start here.***

Thank you for informing us of your intention to include Villanova University in your will or estate plan, or as a charitable beneficiary of your retirement plan, life insurance or other assets. ***Welcome to the 1842 Heritage Society,*** which recognizes and honors the generosity of alumni, parents, faculty, staff and friends who are leaving a legacy for future generation of Villanovans.

Villanova has embarked on a \$600 million campaign — the largest in the University’s history. The campaign is dedicated to 1) cultivating academic innovation, 2) attracting and supporting world class teacher-scholars, 3) expanding student opportunities and financial aid, and 4) building a premier, student-centered living and learning environment. While fundraising for these current priorities is the most urgent challenge, planned gifts provide a critical future stream of philanthropic dollars for the University. If you will be age 65 before the end of 2018 your revocable bequest intention will ***help us reach our campaign goal.***

Please complete this form to notify Villanova of your generous intention. *The details will remain confidential.*

Name: _____	Name: _____
Class Year: _____	Class Year: _____
Birthday: _____	Birthday: _____
Address: _____	
City, State, Zip: _____	
Email: _____	Phone: _____

For gifts that will take effect after your lifetime, Villanova University should be named as:

Villanova University In The State Of Pennsylvania
800 Lancaster Avenue, Villanova, PA 19085

Tax ID: 23-1352688

Please contact us at 800-486-5244 for sample bequest language that you can include in your will.

Section to be completed by the University

Received by: _____ Title: _____

Date: _____ Campaign Code _____ Banner ID: _____ Notes _____

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Additional Information

When planning for a bequest, you will need to consider how you would like your gift to be used to benefit Villanova in the future — whether you wish to designate your gift to Villanova's greatest needs, to a specific school and/or program (e.g. Athletics, Scholarships or Library). Please indicate how you wish your gift to be designated:

By making this gift, you become a member of the **1842 Heritage Society**. To recognize your generosity and to inspire others to make similar gifts, we would like to list your name in Villanova publications. *The nature and size of your estate gift will be kept strictly confidential.* Please indicate your preference below:

- I am willing to be listed as a Heritage Society member I prefer to remain anonymous for this gift

Please list name(s) as: _____

Type of Bequest: The following information is helpful to Villanova for planning purposes. Please check all that apply and estimate the value of each gift in today's dollars. If you have named Villanova as a percentage beneficiary, please indicate the dollar value of the University's percentage so that we can recognize you for your generosity.

- | | |
|---|---|
| <input type="checkbox"/> Will: \$ _____ | <input type="checkbox"/> Insurance policy: \$ _____ |
| <input type="checkbox"/> Revocable living trust: \$ _____ | <input type="checkbox"/> Real estate (describe below): \$ _____ |
| <input type="checkbox"/> Charitable remainder trust: \$ _____ | <input type="checkbox"/> Other asset (describe below): \$ _____ |
| <input type="checkbox"/> Retirement plan/IRA: \$ _____ | Is this gift to Villanova contingent on another beneficiary surviving you? <input type="checkbox"/> No <input type="checkbox"/> Yes |

Additional Information: _____

Villanova University wishes to assure you that this statement of intention does not constitute a legal obligation and will not be legally binding in any way on you, your heirs or your estate. Further, Villanova understands that the size of your future gift may be significantly different from the amount estimated above.

Signature: _____ Date: _____

Signature: _____ Date: _____

For more information or if you have questions, please contact Villanova's Office of Planned Giving toll-free at 800-486-5244 or at plannedgiving@villanova.edu. Our website is www.villanova.edu/plannedgiving.

Please return this completed form to: Villanova University, Office of Planned Giving, 800 Lancaster Avenue, Villanova, PA 19085.