

Documenting Your Willows Society Gift

The Willows Society recognizes Colby alumni, parents, and friends who have made a testamentary (that is, at death) gift to the College. These gifts have been a cornerstone of Colby's financial success and stability, and the College is deeply grateful to each Willows Society member for this special expression of loyalty and support. Please signify your gift intention by completing this form.

Yes, I Have Made a Testamentary Provision for Colby and Am Pleased To Be a Member of the Colby Willows Society

I have provided for Colby in my:

- | | | |
|---------------------------------------------------|-------------------------------------------------------|------------------------------------------------|
| <input type="checkbox"/> Bequest/Will/Estate Plan | <input type="checkbox"/> Retirement Plan | <input type="checkbox"/> Life Insurance Policy |
| <input type="checkbox"/> Trust | <input type="checkbox"/> Brokerage or Savings Account | <input type="checkbox"/> Other: _____ |

Letting Colby Know of Your Gift Intention

You can help to ensure that your gift intentions are understood and can be fulfilled by completing this form. The information you provide to Colby is completely confidential. In fact, you may remain anonymous or allow the College to publicize your special gift by checking the appropriate box when you sign this form.

Information About Your Willows Society Gift Intention

Please inform Colby of your intention by providing a brief description of your testamentary provision(s).

I have made the following provision(s) for Colby:

Estimating Your Willows Society Gift

Estimating the current value of your gift provision(s) assists Colby with its long-term financial and programmatic planning. If your gift is being made as part of a capital campaign or a special reunion, providing an estimate will help the College and your class realize their goals.

I estimate the current value of the gift provision(s) as noted below. I understand that there are various factors that might affect the eventual amount of my gift and that Colby may take those into account when estimating the discounted present value of my gift.

Testamentary Gifts Are Revocable and Non-Binding

Colby understands that testamentary gift intentions can change based on unexpected life events. We thank you for including Colby in your planning.

Directing Your Willows Society Gift

If there are specific initiatives that you support and to which you would like to direct your gift, please indicate in the space provided.

I desire to have my eventual gift support the following initiatives. I understand that at the time of my gift, if circumstances have changed so significantly that it is no longer practical to use my gift in this manner, the Trustees of Colby College retain the right to use my gift for other purposes that most closely fit my original intent.

Documentation, Recognition, and Counting

- Attached is a copy of relevant portions of my will or estate plan provision, or the beneficiary designation document that names Colby as a beneficiary.
- You may include my name in the Willows Society. Please list me as: _____
- I prefer to remain anonymous
- As I am 70 years old or older, or will be before the conclusion of my class's 50th anniversary gift program, it is my understanding that my Willows Society gift will be recognized as a gift to Colby. If I have designated a portion of my residuary estate rather than a fixed amount, I further understand that my good faith estimate of the current value of this percentage is sufficient for Colby to use in counting my gift.

Signature and Date

Signature and Date

Name (printed)

Name (printed)

Date of birth

Date of birth

Address/City/State/Zip

Phone

E-mail