



CONFIDENTIAL BEQUEST INTENTION FORM

Thank you for remembering Colby in your estate plans. The Colby Legacy Society recognizes and celebrates Colby alumni, parents, and friends who choose to support the long-term success of the College in this important way.

Colby has embarked on the largest fundraising campaign ever at a liberal arts college—Dare Northward. With the success of this campaign, Colby will be known for its distinctive set of multidisciplinary academic offerings, a diverse and inclusive institutional culture, world-class facilities, strengthened global experiences for every student, and the capacity to support their postgraduate success. Planned gifts are critical to the philanthropic foundation of a campaign of this caliber.

Help ensure that your gift intentions are understood and fulfilled by completing this confidential form:

Contact Information

Name and class year (printed)

Name and class year (printed)

Date of birth

Date of birth

Address/City/State/Zip

Phone

Email

Directing Your Colby Legacy Society Gift

I/We would like this gift to support:

- ☐ Colby's greatest needs as determined by the president and trustees
- ☐ Existing named scholarship fund/endowment: _____
- ☐ Department or program: _____
- ☐ Please contact me to discuss how my gift could be used

Counting Your Colby Legacy Society Gift Towards the Campaign

Estimating the current value of your gift provision(s) assists Colby with its long-term financial and programmatic planning.

Note: If you will reach age 70 before the campaign ends (June 30, 2023), your gift will count toward the Dare Northward campaign. Additionally, if you will be celebrating your 50th reunion during the campaign, it will also count toward your class gift. To ensure this, please provide an estimate of the current value of your gift as well as a copy of the relevant pages of your will or trust or a copy of your beneficiary designation form.

- | | |
|--|--|
| <input type="checkbox"/> Will: \$_____ | <input type="checkbox"/> Insurance Policy: \$_____ |
| <input type="checkbox"/> Revocable Living Trust: \$_____ | <input type="checkbox"/> Real Estate: \$_____ |
| <input type="checkbox"/> Retirement Plan/IRA: \$_____ | <input type="checkbox"/> Other Asset: \$_____ |
| <input type="checkbox"/> Charitable Remainder Trust: \$_____ | |
| <input type="checkbox"/> Additional Comments: _____ | |

Recognizing Your Colby Legacy Society Gift

To recognize your generosity, we are honored to welcome you as a member of the Colby Legacy Society. To inspire similar giving, we may include information about your Colby Legacy Society membership in Colby publications from time to time. Please indicate your preference below by checking all that apply.

- ☐ You may include my name as a Colby Legacy Society member.
My/Our name(s) should appear as:

- ☐ You may also include the amount/details of my gift.
- ☐ I prefer to remain completely anonymous.

Colby College does not intend for this form to be legally binding on you, your heirs, or your estate. The College also realizes that your estate plans may change over time. If your plans do change, please notify us so that we can update your record.

Signature and Date

Signature and Date

Questions? Contact Gift Planning at 800-809-0103 or giftplanning@colby.edu

Return form to: Gift Planning, Colby College, 4370 Mayflower Hill, Waterville, ME 04901-8843