



## CONFIDENTIAL STATEMENT OF LEGACY GIFT

### LEGACY GIFT CONFIRMATION

If you have made a legacy gift to Rollins College, please take a moment to complete the form below and return it to us. Legacy donors who have remembered the College with a life income gift or have named Rollins as a beneficiary of a will, trust, retirement plan, or life insurance policy are recognized as members of the Cloverleaf Society.

Name: \_\_\_\_\_ Is this a joint gift? (Y/N) \_\_\_\_\_ Yes \_\_\_\_\_ No \_\_\_\_\_

Spouse: \_\_\_\_\_

Class Year(s) and School(s): \_\_\_\_\_ Parent Year(s) (if applicable): \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Telephone: \_\_\_\_\_ Email: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Spouse Date of Birth: \_\_\_\_\_

I/We have named Rollins College as a beneficiary in one or more (please indicate if the College is named as a primary, secondary, or contingent beneficiary):

(Check all that apply)

- Will or Living Trust: \_\_\_\_\_ specific amount or \_\_\_\_\_ %
- IRA, pension, 401(k), 403(b) or other retirement account
- Life Insurance Policy
- Charitable Remainder Trust (CRT)
- Charitable Lead Trust (CLT)
- Donor-advised Fund
- Other (please specify): \_\_\_\_\_

\_\_\_\_\_ (Please initial) I/We have attached copies of the documentation (ex. sections of my will or trust, beneficiary designation forms, bank or brokerage statements, etc.).

\_\_\_\_\_ Gift Value (or best estimate)

Gift Designation (if applicable): \_\_\_\_\_

Comments: \_\_\_\_\_

Please enroll me/us as a member of the Cloverleaf Society:

- I/We may be included in a list of Cloverleaf Society members in Rollins College publications
- I/We prefer to remain anonymous, but will accept other benefits of membership

*While this form is not a binding agreement or pledge, it simply permits us to record your estimated gift, recognize you for this intention, and "have the files in order" for future use. The details of this form as well as any additional information you share with us will remain confidential.*

Signature(s): \_\_\_\_\_ Date: \_\_\_\_\_