

# Documenting Your Provision for Bowdoin

Name(s): \_\_\_\_\_ Class Year(s): \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_

State: \_\_\_\_\_ Country: \_\_\_\_\_ Postal code: \_\_\_\_\_ Date(s) of Birth: \_\_\_\_\_

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

## GIFT TYPE:

- Will or trust provision
- Retirement or investment account beneficiary provision
- Life insurance beneficiary provision
- Other: \_\_\_\_\_

## I WOULD LIKE MY GIFT TO SUPPORT:

- A College priority as determined by the Board of Trustees (unrestricted)
- An existing fund: \_\_\_\_\_
- A department or program: \_\_\_\_\_
- Please contact me to discuss how my gift could be used.

## ATTACHED IS:

- A copy of my will or trust provision pertaining to my bequest to Bowdoin
- A copy of my provision designating Bowdoin as a beneficiary of a percentage of an account or financial instrument I own  
*TYPE OF ACCOUNT:* retirement account investment account life insurance policy other: \_\_\_\_\_
- A copy of my designation of Bowdoin as successor-in-interest of a percentage of my donor-advised fund
- Other (provide details): \_\_\_\_\_

## NEXT OF KIN:

Name: \_\_\_\_\_

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

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

## THE PERSON WHO WILL HANDLE MY ESTATE AFFAIRS (EXECUTOR OR PERSONAL

Name: \_\_\_\_\_

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

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

- Same as next of kin

## SIGN AND DATE:

Print name(s): \_\_\_\_\_

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

Date: \_\_\_\_\_

*Bowdoin recognizes that this gift is subject to change depending on personal and economic circumstances. This form is not intended to be a legally binding pledge, and any information provided will remain confidential.*

*This gift qualifies you for membership in the Bowdoin Pines Society.*

## THIS GIFT IS:

- Not Anonymous
- Anonymous

## BOWDOIN WILL RECEIVE THIS GIFT:

- Upon my death
- Upon the death of my surviving spouse
- Other: \_\_\_\_\_

## THIS PROVISION IS STATED AS:

- A specific dollar amount: \$ \_\_\_\_\_  
OR
- A percentage of my estate/account: \_\_\_\_\_ percent.  
If based on a percentage, please estimate the current value of the gift to Bowdoin: \$ \_\_\_\_\_.

### RETURN BY MAIL:

Office of Gift Planning  
Bowdoin College  
4100 College Station  
Brunswick, Maine 04011

### RETURN BY EMAIL:

giftplanning@bowdoin.edu

### FOR QUESTIONS AND MORE INFORMATION:

207-725-3172  
bowdoin.edu/gift-planning

**Bowdoin**

 **BOWDOIN**  
PINES SOCIETY