

Please use this form to share your bequest intentions for College of the Holy Cross. In recognition of your intention, we are honored to invite you to the 1843 Legacy Society, a select group of donors who have named the college as a beneficiary of their estate plans.

This statement **is not** legally binding on you, your estate or the College. Your intentions remain revocable and can be modified at any time. This form is for informational purposes and will be held in confidence.

Your Legacy

If your gift is for a percentage of your estate, rather than a fixed dollar amount, Holy Cross will be happy to use your good faith estimate of the current value based on this percentage. While not required, you may wish to include a copy of the relevant portion of related documents with this form.

By documenting your bequest intention, the college will have an opportunity to recognize your generous support in your lifetime. Donors ages 65 and older will receive 100% gift credit for the good faith estimated value of their gift.

NAME _____ DATE _____

PREFERRED STREET ADDRESS _____

CITY _____ STATE _____ ZIP CODE _____

EMAIL _____ HOME PHONE _____ MOBILE PHONE _____

I have made revocable gift commitments to College of the Holy Cross as follows:

<input type="checkbox"/> Bequest	APPROXIMATE VALUE _____
<input type="checkbox"/> Life insurance policy	APPROXIMATE VALUE _____
<input type="checkbox"/> IRA or other retirement plan	APPROXIMATE VALUE _____
<input type="checkbox"/> Other asset	APPROXIMATE VALUE _____

☐ I have attached documentation from my will, retirement plan, life insurance policy, or trust.

DESCRIPTION OF INTENDED USE OF GIFT _____

SIGNATURE / DATE _____

SIGNATURE / DATE _____

In recognition of your intention, the College of the Holy Cross will enroll you as a member of the 1843 Legacy Society.

☐ **Yes!** You may publicize my/our name(s) as member(s) of The 1843 Legacy Society, which may inspire others to consider legacy gifts in support of the college.

PLEASE LIST MY/OUR NAMES AS _____

☐ I/we prefer my/our intention to include Holy Cross in my/our personal legacy to remain anonymous.

CONTACT INFORMATION – REPRESENTATIVE OF MY ESTATE _____

TO LEARN MORE, PLEASE CONTACT:

Julie Karavan, *Director of Gift Planning*
 Thomas McGinley, *Associate Director of Gift Planning*
 Andrew McIntosh, *Assistant Director of Gift Planning*
 1843legacysociety.org | giftplanning@holycross.edu
 CALL (508) 793-3091 | TEXT (609) 457-3426