

Verify Your Planned Gift



Thank you for your interest in verifying your planned gift with St. Lawrence.

In addition to becoming a member of the **G. Atwood Manley Society**, the University has a 3-Step Verification Process for you and your spouse (if making a joint gift) and St. Lawrence to ensure there is consensus as to the purpose, impact level, and the estate instrument you are using to make a planned gift commitment.

Please know that you and your spouse (if making a joint gift) can verify your planned gift commitment either by being 60 years of age on or before June 30th of the current academic year or by signing a Gift Agreement which states your planned gift commitment is irrevocable.

The 3-Step Process to verify your planned gift with St. Lawrence.

1. Complete the full one-page **G. Atwood Manley Society Member Information Form** and indicate:

- Purpose of your planned gift - scholarship aid, academic or athletic program, endowment, or to be used for highest priorities of the University when received.
- Planned gift vehicle - will, trust, retirement or investment account, or life insurance policy.
- Current value of your planned gift.
- Any contingencies or restrictions on your planned gift.

Before proceeding to Step 2, we encourage you to send the completed form to the Office of Planned Gifts to be sure your planned gift is eligible for verification. **We strongly recommend that you do not send confidential information by email.**

Mail:

St. Lawrence University
Attention: Office of Planned Gifts
23 Romoda Drive
Canton, NY 13617

Fax:

315-229-5620
Attention: Office of Planned Gifts

Secure online transfer:

If you would like to request secure online transfer instructions, please contact Kurt Terrell, Director of Planned Gifts at kterrell@stlawu.edu, 315-229-5026 (office).

2. After receiving confirmation that your planned gift is eligible for verification, you will be asked to share either:

- a copy of your estate plan (will, trust, retirement or investment account, or life insurance policy) that your planned gift is coming through.

OR

- the title page, signature page, and the pages of your estate plan pertaining to the planned gift to St. Lawrence.

We recommend that you redact confidential information from your estate plan including, but not limited to names of heirs, dates of birth, social security numbers, other charitable beneficiaries, and any specific account information.

If your estate gift is a percentage of your estate, retirement or investment account, life insurance policy, donor advised fund (DAF), or another vehicle, we ask you to either:

- confirm in writing the current dollar value of your planned gift or
- provide asset statement(s) for University to calculate the current dollar value of your planned gift to St. Lawrence.

In lieu of above, it will suffice to have your third party professional (attorney, financial advisor, or accountant) send an email or letter stating the current dollar value, purpose, estate instrument, and whether there are any contingencies or restrictions for your planned gift to St. Lawrence.

Please send the items above to the Office of Planned Gifts by mail, fax, or request secure online transfer instructions, see details above.

3. Once the University receives copies of the pages of your planned gift vehicle, the paperwork will be reviewed to be sure there are no contingencies or questions. If there are none, then a Gift Agreement will be drafted for your review.

You will receive the Gift Agreement to review by mail or through DocuSign, a secure online platform. Once you and the University are in agreement, we'll ask you and University representatives to sign the Gift Agreement and your estate commitment will be recognized as a deferred commitment in the current fiscal year and stewarded by the University. If you are an alumnus, it may also count as part of your next **Class Reunion Gift**.



I'm here to answer questions and help. Please contact me at 315-229-5026, kterrell@stlawu.edu, or visit www.plannedgifts.stlawu.edu.

D. Kurt Terrell
Director of Planned Gifts
St. Lawrence University

Because everyone's situation is different, we encourage you to seek professional legal, estate planning, and financial advice before deciding on a course of action. This information does not constitute legal or financial advice and should not be relied upon as a substitute for professional advice.