



MEMBER INFORMATION FORM

All records and details of gift plans are confidential and members can remain anonymous. Please provide as much information as possible and return the form to the Office of Planned Gifts at the address listed below. Any information you provide on this form will help us plan for the future and ensure that your wishes are carried out, but please note that disclosing this information is not required for Legacy Society membership. We recognize that most estate plans are subject to change. Periodically, you may receive a request to confirm your planned gift information. Please do not hesitate to contact us if you have any questions.

Name(s) _____ Class Year(s) _____

Mailing Address _____

Date(s) of Birth: _____ Is this plan joint with your spouse? Yes / No

I have made provisions for St. Lawrence University in my estate as follows (*check any or all that apply*):

Type of Provision:	Provision is listed as percentage?	Estimated <u>Current</u> Value:	Check if contingent:
<input type="checkbox"/> Will or Living Trust	Yes / No	\$ _____	<input type="checkbox"/>
<input type="checkbox"/> IRA or Retirement Plan	Yes / No	\$ _____	<input type="checkbox"/>
<input type="checkbox"/> Life Insurance	Yes / No	\$ _____	<input type="checkbox"/>
<input type="checkbox"/> Charitable Trust	Yes / No	\$ _____	<input type="checkbox"/>
<input type="checkbox"/> Donor Advised Fund	Yes / No	\$ _____	<input type="checkbox"/>
<input type="checkbox"/> Other	Yes / No	\$ _____	<input type="checkbox"/>

Please provide any additional details that you would like to share below:

My gift is designated as:

- Unrestricted (General operations)
 Restricted for the following purpose: _____

May we publicly honor you as a member of the Legacy Society so that others may be inspired to give through your example? Your name(s), but not the details or amount of your estate intention, would appear in our member listings.

Yes No, I wish to remain anonymous.

As part of our commitment to honoring donors' wishes, St. Lawrence would welcome any documentation of your estate gift, such as your beneficiary designation form, Will or Trust, or the appropriate section(s) thereof.

St. Lawrence University
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 Canton, NY 13617
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