



This form is to help you provide information about your future gift to Occidental College. By sharing this information, you help to ensure that your gift will be used as you intended. This document will be kept confidential.

TYPE OF GIFT

I/We have included Occidental College in my/our estate plans through one or more of the following planned gifts:

- ___ Bequest in will or revocable trust for the dollar amount of \$ _____
- ___ Bequest for _____% of my estate; estimated value of..... \$ _____
- ___ Retirement plan beneficiary designation; estimated value of \$ _____
- ___ Insurance policy beneficiary designation; benefit of \$ _____
- ___ Other; estimated value of \$ _____

PURPOSE OF THE GIFT

Many donors feel most confident that their gift intention will be honored when they provide Occidental College with a copy of the section of the will that pertains to their gift. We welcome documentation of your gift in this way. If you prefer not to provide a copy of the bequest language, please indicate below the purpose of your gift:

DONOR RECOGNITION

- ___ List name(s) on donor honor roll as: _____
- ___ I/We prefer to be anonymous.

Name _____ Date of Birth _____
(PRINT)

Signature _____ Date _____

Name _____ Date of Birth _____
(PRINT)

Signature _____ Date _____

Thank you for your thoughtful investment in the future of Occidental College. As with any decision involving your estate, we recommend that you seek the advice of professional counsel. Your signature verifies only that the above information is accurate and in no way binds you to your commitment.