



CONFIDENTIAL STATEMENT OF ESTATE INTENTIONS

Name: _____ Class Year or Affiliation: _____

Mailing Address: _____

Date of Birth: _____ Email Address: _____

I have made provisions for Wheaton in my estate as follows:

Estimated Amount of the Current Value of Your Gift

- Fixed dollar amount as an outright gift in:
My will or trust (Is trust irrevocable? Yes No)
Surviving spouse or partner's will or trust (Is trust irrevocable? Yes No)
Percentage (%) for Wheaton of the residue clause of a will or revocable trust
Percentage (%) remainder for Wheaton in a charitable trust
Percentage (%) for Wheaton as beneficiary of IRA, 401(k), TIAA-CREF or other pre-tax retirement account
Other, please check if applicable:
Contingent provision to take effect if other beneficiaries predecease me
Beneficiary of a paid up life insurance policy
Gift of real estate (requires approval of Wheaton's Gift Acceptance Committee)
Personal property, including art, personal collections, etc. (requires approval of Wheaton's Gift Acceptance Committee)

Designation: I would like my gift to support the following college initiative:

- Student Scholarship
Student-Faculty Research Collaborative Fund
Career Exploration Fund
General Endowment
Wherever most needed
Other:

You will be contacted to ensure we can carry out your wishes.

Public

Recognition: May we publicly honor you as a member of the Wheaton Founders Society so that others may be inspired to give through your example? Yes No

Would you be willing to share your personal story in one of our publications? Yes No

Attachments or letters that further describe the nature of the above provision(s) are welcome. By signing this form, I am informing Wheaton that the above provisions are in effect as of this date; however, there is no binding pledge intended or assumed.

Date: _____ Signature: _____

Please return to:

Office of Gift Planning ♦ 26 East Main Street ♦ Norton, MA 02766
(800) 896-3145 ♦ Option 5