



## Founders Society

26 E. Main Street  
Norton, Massachusetts  
02766-2322  
508-286-3391



### 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
- General Endowment
- Internship Fund
- 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: \_\_\_\_\_