



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
- 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:

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

Please list your name as you would want it to appear publicly: _____

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

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: _____