

Declaration of Future Intent

Bard

Thank you for considering Bard in your estate plans. Information disclosed in this form will remain confidential and is not legally binding.

- New Intention
 Updated Intention

MY/OUR INFORMATION

Name (print)

Spouse Name (if joint gift)

Address

City/State

Country/Postcode/ZIP

Phone Number

Email Address

GIFT INFORMATION

I/We have provided a gift to Bard College as set forth in my/our:

- Retirement Plan or Beneficiary Designation (401(k), 403(b), IRA, Keogh, Brokerage Account)
 Life Insurance Policy
 Charitable Remainder Unitrust
 Other Asset(s) (please describe): _____

- Bard College is a contingent beneficiary of the indicated asset above (please provide detail):

The current estimated value of my/our gift is \$_____.

My/Our gift is _____% of the asset indicated above.

The current estimated value of the percent in today's dollars is \$_____.

GIFT PURPOSE

- Please use my gift for the area of Bard's greatest need.
 I/We have signed a Gift Agreement for the use of this gift.
 I/We have not signed a Gift Agreement. We wish Bard to use this future gift for the following purpose: _____

RECOGNITION PREFERENCE

All donors who disclose a planned gift to Bard become recognized members of the Margaret and John Bard Society.

- I/We prefer to be recognized as follows in any publications: _____
 Prefer no public recognition/to remain anonymous

Please continue to the reverse side to complete the form.

ESTATE CONTACT INFORMATION (OPTIONAL)

Executor, Trustee (if your gift is through a Will, Trust)

Name (print)

Address

City/State

Country/Postcode/ZIP

Phone Number

Email Address

Asset Administrator (for retirement accounts or insurance policies)

Name (print)

Address

City/State

Country/Postcode/ZIP

Phone Number

Email Address

Additional Contact/Relationship (family, attorney, etc.)

Name (print)

Relation

Address

City/State

Country/Postcode/ZIP

Phone Number

Email Address

I/We understand this form does not create a binding obligation and any details about my/our gift will remain confidential. Bard College understands that the size of my/our future gift may change.

Signature

Spouse Signature (if joint)

Date

Please return to:

Debra Pemstein, Vice President for Development and Alumni/ae Affairs
Bard College, PO Box 5000, Annandale-on-Hudson, NY 12504-5000

Phone: 845-758-7405 **Email:** mjbs@bard.edu