STEVENS LEGACY SOCIETY

Confidential Statement of Planned Gift Provision

STEVENS
INSTITUTE OF TECHNOLOGY

NAME(S) _____

ADDRESS _____

In support of Stevens Institute of Technology and its historic mission, I/we have made the following provision(s)* in my/our financial or estate planning:

Type of Provision	**Estimated Amount** [*Approximate Current Value*]
[ ] An outright bequest in my/our will [ ] or living trust [ ]	$ _____
[ ] A contingent bequest in my/our will [ ] or living trust [ ]	$ _____
[ ] A provision in the will of the survivor of my spouse and myself	$ _____
[ ] A gift of the assets in my retirement plan after my lifetime	$ _____
[ ] A gift of the assets in my donor-advised fund succession plan	$ _____
[ ] A life insurance policy	$ _____
[ ] A trust under my will naming Stevens Institute of Technology as beneficiary *(please identify the income beneficiaries or describe other terms):* _____	$ _____
[ ] Other provision *(please specify nature and terms):* _____	$ _____
Total:	**$ _____**

There is a restriction on my gift provision(s); it is to be used for: _____

Please list my name in any listings of the Stevens Legacy Society as: _____

In the event that unforeseen circumstances necessitate a change in the provision(s) I have described above, it is my intention to so advise Stevens Institute of Technology.

X_____ _____
Date

X_____ _____
Beth McGrath
Vice President of University Advancement/Chief of Staff
Date

Please return signed form by mail or fax to:

Division of University Advancement
Stevens Institute of Technology
1 Castle Point on Hudson
Hoboken, NJ 07030
Fax: (201) 216-8247

Questions? Call Michael Governor
at (201) 216-8967
Michael.Governor@stevens.edu

**** Any attachments providing details – such as the page from your will that mentions Stevens – would be greatly appreciated.***