

Confidential Statement of Charitable Gift Provision

STEVENS LEGACY SOCIETY



STEVENS
INSTITUTE of TECHNOLOGY
THE INNOVATION UNIVERSITY®

NAME(S) _____

ADDRESS _____

In support of Stevens Institute of Technology and its academic 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 will \$ _____

[] 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 life insurance policy (please specify nature and terms): \$ _____

[] A living trust naming Stevens Institute of Technology as beneficiary \$ _____
(please identify the income beneficiaries or describe other conditions):

[] A trust under my will naming Stevens Institute of Technology as beneficiary \$ _____
(please identify the income beneficiaries or describe other terms):

[] Other provision, such as an external Charitable Remainder Trust \$ _____
(please specify nature and terms):

Total: \$ _____

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

Please list my/our name/s in member listings of 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 _____
Date
Laura Lacchia Rose
Vice President
Development and Alumni Engagement

Please return signed form by mail or fax to:

Division of Development and Alumni Engagement

Stevens Institute of Technology

1 Castle Point Terrace

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.