

# STEVENS LEGACY SOCIETY ENROLLMENT FORM

Confidential Statement of Planned Gift Provision



**STEVENS**  
INSTITUTE of TECHNOLOGY  
THE INNOVATION UNIVERSITY

NAME(S) \_\_\_\_\_

ADDRESS \_\_\_\_\_

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

## Type of Provision

## Estimated Amount

[Approximate Current Value]

[ ] An outright bequest in my will \$ \_\_\_\_\_

[ ] A contingent 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 \$ \_\_\_\_\_

[ ] 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 (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 \_\_\_\_\_  
Jennifer A. McDonough  
Vice President for Development  
and Alumni Engagement  
Date

Please return signed form by mail or fax to:

## Development and Alumni Engagement

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](mailto:Michael.Governor@stevens.edu)

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