



### CONFIDENTIAL LETTER OF INTENT FOR PLANNED (ESTATE) GIFTS

Birmingham-Southern College

As evidence of my/our desire to provide future support for Birmingham-Southern College, I/we hereby inform Birmingham-Southern College that I/we have made a provision for a gift to the College in my/our estate plans.

Donor 1 (Full Name) \_\_\_\_\_ Date of Birth \_\_\_\_\_ Donor 2 (Full Name) \_\_\_\_\_ Date of Birth \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Preferred Phone (area code and number) \_\_\_\_\_ Email \_\_\_\_\_

Cell Phone – Donor 1 (area code and number) \_\_\_\_\_ Cell Phone – Donor 2 (area code and number) \_\_\_\_\_

It is my/our intent to leave a legacy to Birmingham-Southern College through my/our:

- Will
  - Living Trust
  - Retirement Plan Assets
  - Life Insurance Policy (Beneficiary Only)
  - Life Insurance (BSC Owner)
  - Charitable Remainder Trust
  - Other \_\_\_\_\_
- Executor Name: \_\_\_\_\_  
 Executor Address & Phone: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

This gift will be payable upon:

- 1<sup>st</sup> Death
  - 2<sup>nd</sup> Death (Spouse/Partner). Both signatures required.
- Other \_\_\_\_\_

I/we wish to inform Birmingham-Southern College, for long term planning purposes only, that as of this date, the value of my/our gift is \$\_\_\_\_\_ or \_\_\_\_% \* (If your gift is a percentage of your estate, please indicate the approximate present value of that percentage \$\_\_\_\_\_.) I/we understand that, by stating an amount, my /our estate is not legally bound by this statement and I/we may choose to add, subtract, or revoke this gift at any time, at my/our sole discretion. (BSC requests notification any time you make changes/adjustments to your gift.)

It is my/our desire that this gift be used to benefit the following OR where the need is greatest:

Please enroll me/us in the **Hilltop Heritage Society** under the following conditions:

- I give permission for the College to publish my/our name(s) as member(s) Hilltop Heritage Society. I/We would like to be listed as: \_\_\_\_\_
- Please list my/our name(s) internally at BSC only (no outside publication).
- Do not list my/our names either internally or externally (anonymous gift).

\_\_\_\_\_ Date \_\_\_\_\_ Donor 1 Signature \_\_\_\_\_ Donor 2 Signature \_\_\_\_\_

\*We hope that you will share the approximate amount of your gift with us so that BSC as well as the programs or departments benefiting will know of your generosity and be able to recognize you appropriately. Revised 10/2017