

Name \_\_\_\_\_ UMW Class Year \_\_\_\_\_ Date of Birth \_\_\_\_\_

Spouse/Significant Other's Name \_\_\_\_\_ UMW Class Year \_\_\_\_\_ Date of Birth \_\_\_\_\_

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

Home Phone \_\_\_\_\_ Cell Phone \_\_\_\_\_ Preferred Email Address \_\_\_\_\_

**I/We have made provision(s) for a gift to the University of Mary Washington in the amount of:**

**Dollar Amount:** \_\_\_\_\_ **Or Other Value:** \_\_\_\_\_  
Today's Approximate Value Percentage of Estate/Unspecified/Other Method of Valuation

**My/Our plans provide for a gift to UMW through one or more of the following:**

**Bequest through  
will/trust:**

Cash \_\_\_\_\_  
Stock or property \_\_\_\_\_  
Type of Stock or Property

**Beneficiary  
Designation:**

IRA or Retirement Account \_\_\_\_\_  
Bank Account (Payment on Death) \_\_\_\_\_  
Life Insurance Policy \_\_\_\_\_  
Investment Account (Transfer on Death) \_\_\_\_\_

**Other Gift Type:**

Charitable Gift Annuity Charitable \_\_\_\_\_  
Remainder Trust \_\_\_\_\_  
Charitable Lead Trust \_\_\_\_\_

**Other:**

\_\_\_\_\_ Describe Type of "Other" Gift

This gift is to be unrestricted and may be used where the need is greatest at UMW.

I/We wish to specify that this gift be used for the following: \_\_\_\_\_

\_\_\_\_\_ Describe purpose of gift

***I/We understand that future fluctuations/changes in the market/economy may have an impact on the above-stated gift value. It is understood that the statement of intent is revocable and not legally binding on my/our estate. All information will be kept confidential. The gift amount or the current estimated value of my/our gift may be used for recognition purposes only.***

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

UMW may use my/our name(s) and gift details to inspire others to give.  Please keep my/our gift amount anonymous.

***Please return this form to the Office of Gift Planning, 1119 Hanover Street, Fredericksburg, VA 22401.  
If you have any questions, please contact Jan Clarke at (540) 654-2064 or jclarke@umw.edu.  
As a courtesy, please notify UMW if your estate plans change at any time.***