

Estate Commitment



I/we want to support Carleton College with an estate commitment as follows:

Gift type:

(check all that apply)

- Will or Trust provision
- Retirement plan provision
- Life insurance beneficiary
- Donor-advised fund (DAF) beneficiary
- Other _____

Carleton will receive this gift:

- Upon my death
- Upon the death of the surviving spouse/partner
- Other _____

This provision is stated as a:

- Specific dollar amount: \$ _____
- Percentage of estate/account: _____%. If based on a percentage, please estimate the current value of the gift to Carleton College: \$ _____

Attached is:

- A copy of the will or trust provision pertaining to Carleton College
- A copy of the beneficiary designation form and, if possible, the summary page from a recent statement (for a retirement account or life insurance gift)
- Contact information for my executor or trustee
- Other _____

I/we would like this gift to support:

- Carleton's greatest needs as determined by the Board of Trustees (unrestricted)
- Existing scholarship fund _____
- Department or program _____
- Please contact me to discuss how my gift could be used. My telephone number and/or e-mail address is _____

Name Signature Date

Name Signature Date

Carleton recognizes that this gift is subject to change depending on personal and economic circumstances. This form is not intended to be a legally binding pledge, and any information you provide will remain confidential.

For More Information:

Phone: 800-492-2275 or 507-222-4200 • **Email:** planned-giving@carleton.edu

Mail: Office of Development, One North College Street, Northfield, Minnesota, 55057

Legal name: Carleton College **Tax ID:** 41-0694747

This gift qualifies you for membership in the

**JOSEPH LEE
HEYWOOD
SOCIETY**