



ESTATE GIFT INTENTION FORM

Since 1900 when Jonas Clark's bequest established Clark University's undergraduate college, gifts from estates have provided a vital cornerstone for Clark's success and stability. Please let us know about your estate gift intention for Clark by completing this form. Your documentation will help us to ensure that your gift intentions are fulfilled as well as allowing us to recognize your generosity. The information you provide is confidential and disclosing your gift intention does not create a legally-binding pledge.

I/WE HAVE INCLUDED A GIFT TO CLARK VIA MY/OUR:

- Will or revocable trust
- Retirement plan (e.g. 401k, 403b, pension and/or IRA)
- Charitable gift annuity
- Charitable remainder trust
- Charitable lead trust
- Life insurance policy
- Other (please specify):

CLARK WILL RECEIVE MY GIFT:

- Upon my death
- Upon the death of my spouse if s/he survives me
- Other (please specify):

ESTIMATED GIFT VALUE AS OF TODAY:

- I/we intend to leave \$_____ to Clark University
- I/we intend to leave a percentage of the asset(s) indicated above. Today's estimated value is \$_____
- I/we intend to leave the residuary of my/our estate to Clark. Today's estimated value is \$_____
- I/we intend to leave specific property to Clark. Its description and estimated value are as follows:

FIAT LUX LEGACY SOCIETY

Clark's Fiat Lux Legacy Society honors alumni, parents and friends who have demonstrated their commitment to Clark's future by establishing planned gifts or including the University as a charitable beneficiary of their estate plans.

Join us by creating your legacy gift for Clark today



USE OF MY/OUR GIFT:

When my/our gift is received, it is my/our wish that Clark use these funds for the following purpose(s):

Unrestricted (supporting Clark's general educational mission)

Restricted for the following purpose(s):*

**If, in the future, it becomes impossible or impractical to use my/our gift as described above, I/we understand that the Board of Trustees of Clark University may use my/our gift as they judge best and as consistently as possible with my/our wishes. Please talk with Clark's Planned Giving Office if you would like your gift to create a new endowed fund or if it is narrowly restricted.*

FIAT LUX LEGACY SOCIETY LISTING:

Your gift qualifies you for membership in Clark University's **Fiat Lux Legacy Society**.

Please list my/our name(s) as follows: _____

I/we wish to be anonymous member(s) of the **Fiat Lux Legacy Society**

Name: _____ Class: _____

Name: _____ Class: _____

Address: _____ State: _____ Zip: _____

Email: _____ Phone: _____

Signature: _____ Date: _____

Signature: _____ Date: _____

Please return this form to:

Office of Planned Giving, Clark University, 950 Main Street, Worcester, MA 01610
For questions, call (877) 252-7510 or email plannedgiving@clarku.edu

Please share a copy of this form with your attorney, executor, or other professionals involved in your financial or estate planning. Clark University is a charitable organization organized under section 501(c)3 of the Internal Revenue Code and is exempt from federal income taxation. The University's federal tax identification number is 04-2111203.

