

ESTATE PLAN INTENTION FORM

I want to support Montserrat College of Art by including the college in my estate plan as follows:

DONOR INFORMATION

NAME _____ CLASS YEAR _____
ADDRESS _____ BIRTHDATE _____
STREET _____
CITY _____ STATE _____ ZIP _____
EMAIL _____ PHONE _____

TYPE OF ESTATE COMMITMENT

Gift type:

Will or Revocable Trust provision
Charitable Remainder Trust
IRA or Retirement Plan beneficiary
Life Insurance beneficiary

Montserrat will receive this gift:

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

MY GIFT IS STATED AS

A specific dollar amount: \$ _____

A percentage of estate/account: _____%. The estimated current value of this percentage is: \$ _____

Other (i.e. gifts of tangible or intellectual personal property) _____

SUPPORTING DOCUMENTS

Attached (only one of the following is requested):

A copy of the will or trust provision pertaining to Montserrat College of Art.

A copy of the retirement account/insurance beneficiary designation form and summary page from a recent statement

A letter from my attorney, executor, or trustee

Other _____

GIFT DESIGNATION

I would like my gift to support:

Montserrat's greatest needs (unrestricted)
Scholarships
Please contact me to discuss how my gift could be used.

I would like to talk to someone at Montserrat about using this to start a new endowment at the college.

I would like to add to the following contribution to an existing endowed fund.

DONOR AND GIFT RECOGNITION

I ☐ **do** ☐ **do not** want to receive fundraising credit for the amount of my future gift.

I ☐ **do** ☐ **do not** authorize Montserrat to include my name in publications that may recognize this gift.

ESTATE CONTACT INFORMATION

Who would you like Montserrat to contact upon your death to facilitate the distribution of your gift?

Executor Trustee IRA Custodian/Plan administrator Family Member Other _____

NAME _____

BUSINESS _____

ADDRESS _____
STREET CITY STATE ZIP CODE

EMAIL _____ PHONE _____

COMMENTS:

Would you like to share your Montserrat Story? If you'd like to tell us what inspired your gift, we'd love to know!

DONOR SIGNATURE

DATE

Montserrat understands that your plans or financial circumstances may change and the College does not make financial commitments in anticipation of any future estate gifts. This form is not intended to be a legally binding pledge. All information you provide will remain confidential.

Montserrat College of Art Tax ID #52-1859814

Please return form to:
Development Office • 23 Essex Street, Beverly, MA 01915 • (978) 867-9620 • development@montserrat.edu