

Dear Donor,

We realize that many people who plan to support Trinity College through their estate and/or financial plans prefer to keep their intentions private. However, by letting us know of your plans, we can thank you during your life, and confirm that we are able to fulfill your stated intentions.

Please know that completing this form is non-binding — we understand that you may change your plans at any time. Please also know that all information you share with us is kept strictly confidential.

Linda Minoff, Director of Gift Planning Trinity College

Phone: (860) 297-5353

Email: linda.minoff@trincoll.edu

Planned Gift Notification – Confidential

Personal Information

Name:			
Spouse Name:			
City:		Zip:	
Phone:	Email:		
Date(s) of Birth:			

Your Gift Intention

Please provide the following information and attach a copy of the documentation or appropriate language from your will or trust, if available. Please complete all that apply.
☐ I/We want to support the mission of Trinity College through a planned gift as described below:
☐ I/We have included a bequest for Trinity College in my/our will or living trust.
I/We have named Trinity College as a beneficiary of an asset:
☐ Retirement Plan ☐ Bank, Investment, or Other Financial Account
Life Insurance Policy Other:
I/We have named Trinity College as a revocable/irrevocable (circle one) beneficiary of a charitable remainder trust.
The anticipated value of my/our gift is/will be approximately \$ or % of my/our estate. (If possible, please include a copy of the bequest language or other wording describing your planned gift.)
Please provide a general description of the gift provision (such as, asset to be donated if other than cash or securities, how gift is to be used, whether gift is to create an endowment, etc.):
Yes, you may include me/us in listings of planned gift donors.
Please indicate how you would like your name(s) to appear in The Elms Society listings. (Please note the amount of your intended gift will not be published):
No, please do not include me/us in listings.
Signature(s):
Date:

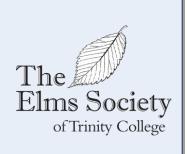
Return form to:

Linda Minoff Director of Gift Planning Trinity College 300 Summit Street, Hartford CT 06106

Phone: (860) 297-5353

Email: linda.minoff@trincoll.edu

ESTATE COMMITMENT NOTIFICATION (CONFIDENTIAL)



The Elms Society
was created to
recognize and thank
alumni, family, and
friends who have
included Trinity
in their estate plans
or made a planned
gift to Trinity.

The College honors the generosity of members through special recognition and invitations to events.

Trinity College Tax ID

06-0646927

Please return this form to:

Office of Gift Planning Trinity College 300 Summit Street Hartford, CT 06106-3100 860-297-2006

The details you provide here remains	ain completely confidential a	nd not leg	ally bin	ding.
Name(s) Cla				
I am pleased to join The Elms So	ciety based on the following	(check all	that ap	ply):
☐ Bequest (estimated dollar ame	Bequest (estimated dollar amount or percentage)*		/	%
☐ Charitable Remainder Trust (estimated dollar amount)*		\$		
☐ Retirement Fund designation (estimated dollar amount)*		\$		
☐ Donor-advised Fund (estimated dollar amount)*		\$		
☐ Life Insurance (dollar amount)		\$		
☐ I wish my gift to be listed as a☐ Apart from myself, the gift to ☐				of:
Name	•		, ,	
Name	Relationship	DOB_		
I/we would like this gift to support	•			
☐ Trinity's greatest needs as de	termined by the Board of Tru	ustees (un	restrict	ed)
☐ Existing scholarship fund				
□ Department or program				
 Please contact me to discuss My contact information is shown 				
o Telephone:				
Signature	 Date			
Signature Thank you for your support of Trinity	Date College. For more information	, please co	ntact	

*We understand that assets fluctuate. Please provide a conservative estimate of today's value.

giftplanning@trincoll.edu or visit www.trincoll.edu/legacy.