



Trinity College
HARTFORD CONNECTICUT

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: _____

Address: _____

City: _____ State: _____ 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 *(Please note the amount of your intended gift will not be published):*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.

The details you provide here remain completely confidential and not legally binding.

Name(s) _____ Class _____

I am pleased to join The Elms Society based on the following (check all that apply):

- 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 an anonymous gift from a person in my class.

Apart from myself, the gift to Trinity will come into effect after the life (lives) of:

Name _____ Relationship _____ DOB _____

Name _____ Relationship _____ DOB _____

I/we would like this gift to support:

- Trinity'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 contact information is shown below:

Telephone: _____

Email: _____

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

Signature Date

Signature Date

Thank you for your support of Trinity College. For more information, please contact giftplanning@trincoll.edu or visit www.trincoll.edu/legacy.

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