

## Confirmation of Your GW Legacy Gift

Please complete this form to share the details of the planned gift you have established to benefit the university. By providing this information:

- We can help ensure your gift will be used in accordance with your wishes.
- You will become a member of the Heritage Society (please see enclosure for more information)
- We can thank you for your generosity and commitment to the George Washington University.

Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Name (if joint gift): \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Telephone: \_\_\_\_\_ Email: \_\_\_\_\_

GW Alumnus/na?  YES  NO Degree(s)/ Year(s): \_\_\_\_\_

I/we wish to remain anonymous and request that my/our name(s) not be publicly listed.

Please describe the source of your gift. Optional: Please attach a copy of your gift documentation for GW's records.

- Will or Revocable Living Trust
- IRA, Retirement, or Investment Account (Administrator: \_\_\_\_\_)
- Donor Advised Fund (DAF) Remainder Beneficiary
- Life Insurance Policy (Issuer: \_\_\_\_\_)
- Other (Please Specify): \_\_\_\_\_

**Contingencies: Please check if applicable.**

- My bequest to GW is contingent upon the prior death of a spouse, partner, or child
- My spouse/partner has done the same. GW will receive the gift after the lifetime of the second-to-die.

**Designation of Commitment:**

- Unrestricted to the George Washington University
- Unrestricted to GW's \_\_\_\_\_ School or College
- Restricted to \_\_\_\_\_

**Please indicate:**

- The specific value of your gift to GW \$ \_\_\_\_\_ OR
- GW's portion of your estate \_\_\_\_\_ % and/or the approximate estimated value \$ \_\_\_\_\_

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Signature (if joint gift)

\_\_\_\_\_  
Date

- I/we would be willing to have this gift intention profiled in a future GW publication.

**This document does not bind you or your estate.** By signing this form, you are acknowledging your current plans to benefit the George Washington University in the future. We respectfully request notification of changes in the value and type of your gift. All information and supporting documents will be kept private and confidential.

*Thank you for including the George Washington University in your estate plans.*



Heritage Society

THE GEORGE  
WASHINGTON  
UNIVERSITY

WASHINGTON, DC



## Heritage Society

### *Planned Giving Societies*

## *The George Washington University*

Planned gifts are financial building blocks for the education of generations to come, ensuring that GW has the resources it needs to continue thriving far into the future. These far-reaching gifts allow GW to plan for the future with confidence that the University will have the means to advance its mission of education, research, and public service. Planned giving options include bequest commitments, gifts of retirement fund assets or life insurance policies, charitable gift annuities, and charitable remainder trusts, among other giving arrangements. The staff of the Office of Planned Giving will be happy to work with you and your financial advisors to create an individually-tailored gift plan that will fulfill your personal philanthropic goals while also providing future support for GW.

### *Heritage Society*

The Heritage Society recognizes and honors those alumni and friends who have chosen to provide future support for GW through a documented planned gift of any size.

The benefits of membership include:

- Heritage Society lapel pin
- Holiday Tea with an opportunity to meet current GW students
- Members-only luncheon with President Thomas LeBlanc
- Invitations to select campus events and programs

### *Tempietto Circle*

The Tempietto Circle ("little temple") is named for the distinctive campus landmark that graces Kogan Plaza. It recognizes alumni and friends who have made one or more planned gifts to GW that total \$500,000 or more.

The benefits of membership include:

- All benefits of the Heritage Society, plus
- Complimentary tickets to special campus events

**For more information and/or assistance, please call (877) 498-7590 or email [pgiving1@gwu.edu](mailto:pgiving1@gwu.edu).**

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UNIVERSITY**

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