

Statement of Intent

1839 Society
Longwood University



Society members build a legacy at Longwood University, perpetuating both the University's educational mission, and their own role in carrying on that vital work.

I have included Longwood University Foundation in my estate plans in the following way:

- ☐ A bequest in my will or inclusion in my revocable (living) trust for either \$_____ or _____% of the residuary.
- ☐ Designation of part or all of the final balance of my retirement plan account (IRA, 401(k), or other type) for either \$_____ or _____% of the final balance.
- ☐ My charitable remainder trust, dated _____, of which Longwood University Foundation is beneficiary of _____% of the trust remainder.
- ☐ As beneficiary of an insurance policy, with death benefit of \$_____, of which _____% is designated for Longwood University Foundation.
- ☐ My charitable lead trust, dated _____, of which Longwood University Foundation is beneficiary of \$_____ or _____% of the trust's annual payments for a period of _____ years.
- ☐ Other: _____.

This gift is designated as follows:

- ☐ Without restriction, for use where need is greatest.
- ☐ As endowment, with income unrestricted.
- ☐ As endowment, with income designated as follows:

_____.

Continued on other side



Statement of Intent

CONTINUED

Name(s): _____

Please write your name as you would like it to appear in Society listings

☐ I/we prefer to keep our membership anonymous.

Signature(s): _____

Date: _____

Contact Information (for internal only):

Name(s): _____

Address: _____

City/State/Zip: _____

Phone: _____

Email: _____

This document is intended to signify your intent only, and creates no legal obligation on your part.

> *Mail this form*

Longwood University
Office of Development
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Farmville, VA 23909