

Estate Commitment

I/We want to support Swarthmore by including the College in my/our estate plan as follows:

Section 1: Type of Gift and Provision

Gift type:

- Will or Trust provision
- Retirement assets provision
- Life insurance beneficiary
- Recommended payment to Swarthmore from my donor-advised account
- Other _____

Swarthmore will receive this gift:

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

This provision is stated as:

- A specific dollar amount: \$ _____
 - A percentage of estate/account: _____%.
- I/We estimate the current value of this percentage to be: \$ _____

Section 2: Supporting Documents

Attached is:

- A copy of the will or trust provision pertaining to Swarthmore College
- A copy of the beneficiary designation form.
- The summary page from a recent statement (for a retirement account or a life insurance gift)
- A letter from my attorney, executor or trustee
- Other _____

Section 3: Gift Designation

I/We would like this gift to support:

- Swarthmore's greatest needs as determined by the Board of Managers (unrestricted)
- Existing scholarship fund _____
- Department or program _____
- Please contact me to discuss how my gift could be used. My telephone number and/or email address is _____

Section 4: James A. Michener Legacy Circle Recognition

I/We ____ do ____ do not authorize Swarthmore College to include my/our name(s) on any list and in publications in recognition of my/our support and membership in the James A. Michener Legacy Circle.

I/We understand that no information about the amount of my/our eventual gift will be publicized.

Name

Signature

Date

Name

Signature

Date

Swarthmore recognizes that this gift is subject to change depending on personal and economic circumstances. This form is not intended to be a legally binding pledge, and any information you provide will remain confidential.

