



1746 SOCIETY
PRINCETON UNIVERSITY

DOCUMENTING YOUR BEQUEST INTENTION

To support the educational mission of Princeton University, I have included a bequest to Princeton as part of my estate plan. A copy of the relevant provision of my will, trust, or beneficiary designation is attached. If I make any change to this provision, I will notify the University of the change.

Name

Class Year / Affiliation

Street, City, State, Zip, Country

Preferred Telephone #

Preferred Email

Alternate Telephone #

Current Value of Bequest

Allocation / Purpose of Gift

Date of Birth

Signature

Date

If Princeton will receive the bequest upon the death of your spouse or another individual, gift recognition may be based upon his or her current age. Please provide the name and date of birth for that individual:

Name

Date of Birth

Please submit this form to:

Princeton University
Gift Planning, University Advancement
100 Overlook Center, Suite 300
Princeton, NJ 08540

Phone: 609.258.6318
Fax: 609.258.1881

Email: GiftPlanning@princeton.edu
Website: alumni.princeton.edu/give/gift-planning



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Donors of planned gifts to Princeton are recognized through the 1746 Society. In addition, revocable bequest intentions that meet the following requirements may be eligible for gift recognition credit, including Annual Giving reunion campaigns (starting at the 55th):

- Donor(s) will be age 75 or older by 06/30/2025; age eligibility for couples is based on the age of the younger spouse
- The bequest will be made to Princeton upon the death of the donor or surviving spouse; if two lives, both Wills must include the bequest intention
- Appropriate documentation about the gift that describes method of transfer (Will, trust, beneficiary designation...), asset type (cash, stock, real estate...), estimated value (for the portion expected to come to Princeton, and gift purpose (subject to approval for gift credit):
 - o **A completed *Documenting Your Bequest* form** or a letter describing the gift (asset type/source), gift value, and purpose/allocation
 - o **For testamentary gifts from a Will or trust**, a copy of Will or trust sections that describe the gift type or asset, gift amount (specific, percentage, or residual), measuring lives, the fully executed signature page (with date) are preferred
 - o **For testamentary gifts from a beneficiary designation** (retirement fund, insurance policy, brokerage or bank account...), details pertaining to the account administrator, policy holder's name, and account number are helpful
 - o **For testamentary gifts from a donor advised fund**, details pertaining to the administrator, giving account name, primary account holder, or copy of form designating funds to Princeton
- **For Annual Giving gift credit**, the gift purpose must be unrestricted (including Annual Giving endowment funds)