



**1746 SOCIETY**  
**PRINCETON UNIVERSITY**

## DOCUMENTING YOUR BEQUEST INTENTION

To support the educational mission of Princeton University, I have included a non-contingent 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 non-contingent 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
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Please submit this form to:

Princeton University  
Gift Planning, University Advancement  
100 Overlook Center, Suite 300  
Princeton, NJ 08540  
Email: [GiftPlanning@princeton.edu](mailto:GiftPlanning@princeton.edu)



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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 to class Annual Giving major reunions (starting at the 55th) and to University campaigns:

- 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
- No more than two measuring lives; if two lives, both Wills must include the bequest intention
- Princeton is a primary (not contingent) beneficiary
- 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 **Complete the *Documenting Your Bequest* form** or provide a letter describing the gift(asset type/source), gift value, and purpose/allocation
  - o **For testamentary gifts from a Will or trust**, provide 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)
  - o **For gifts from a beneficiary or pay-on-death designation** (retirement fund, insurance policy, brokerage or bank account...), include the account administrator, policy holder's name, and account number
- **For Annual Giving gift credit**, donors must notify University Advancement and indicate "Unrestricted Annual Giving" or "Annual Giving endowment" for gift purpose on all documentation. Provide reunion year for credit if made in advance (otherwise, gift will be credited to the current fiscal year)
- Allocation or gift purpose subject to University approval