



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

**DOCUMENTING YOUR BEQUEST INTENTION**

To support the educational mission of Princeton University, I confirm my promise to make a gift to Princeton University 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	_____ ALTERNATE PHONE
_____ PREFERRED EMAIL	_____ DATE OF BIRTH

If Princeton will receive the bequest upon the death of your spouse or another individual, gift recognition may depend on that individual’s age. Please provide that individual’s name and date of birth:

_____ NAME	_____ DATE OF BIRTH
_____ CURRENT VALUE OF BEQUEST TO PRINCETON	_____ PURPOSE OF GIFT*
_____ DONOR SIGNATURE	_____ DATE

*\*If your bequest will establish an endowed fund or is for a restricted purpose, additional paperwork may be required for gift recognition. If your bequest is unrestricted, it may be eligible to receive credit for a class Annual Giving campaign. A gift officer from the University may be in touch with you to follow up.*

**Send completed form to: Princeton University, Gift Planning, University Advancement, 100 Overlook Center, Suite 300, Princeton, NJ 08540** or by email to [GiftPlanning@princeton.edu](mailto:GiftPlanning@princeton.edu)

**TO BE COMPLETED BY UNIVERSITY ADVANCEMENT**

The University will recognize this bequest intention as a gift based on the information provided in this form and any supplemental documentation provided.

_____ GIFT CREDIT AMOUNT	_____ CAMPAIGN/AG REUNION CAMPAIGN CREDIT YEAR
_____ SIGNATURE OF GIFT ACCEPTOR	_____ PRINT NAME & TITLE



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### DOCUMENTING YOUR BEQUEST INTENTION: ELIGIBILITY

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 55<sup>th</sup> Reunion, provided they meet the following criteria:

- 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/trusts 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 the relevant portions of the Will or trust describing the gift, including the type of asset (cash, securities, other), gift amount (specific amount, percentage, or residual), measuring lives, and 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 preferred
  - 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)