



HAVERFORD COLLEGE ESTATE COMMITMENT

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

TYPE OF GIFT AND PROVISION

Gift type: *(Your provision is credited to class totals if you are 70 or older.)*

- Will or trust provision
- Retirement plan or IRA provision
- Life insurance beneficiary
- Beneficiary of a Donor Advised Fund (DAF)
- Other _____

Haverford will receive this gift:

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

This provision is stated as:

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

SUPPORTING DOCUMENTS

Attached (only one of the following is requested):

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

GIFT DESIGNATION

I/We would like this gift to support:

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

JACOB P. JONES SOCIETY

I/We do do not authorize Haverford College to include my/our name(s) on any list and in publications in recognition of my/our support and membership in the Jacob P. Jones Society. I/We understand that no information about the amount of my/our eventual gift will be publicized.

Name

Signature

Date

Name

Signature

Date

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

Estate Commitments Benefit Haverford College

The generosity and thoughtfulness of alumni, parents, and friends who have included Haverford in their estate plans help ensure that the College remains at the forefront of liberal arts education. Thank you for including Haverford in your estate plan.

What is an estate commitment?

An estate commitment is a gift that may come from a will, trust, DAF, retirement plan, life insurance policy, or commercial annuity, wherein you designate the College to receive the remainder. Other gifts to be realized in the future may also qualify, and we welcome your questions about them.

My estate gift to Haverford will only become effective if my spouse/partner predeceases me. Can I still be given credit for my gift?

Yes, if your surviving spouse or partner also includes a provision for Haverford in his or her estate plan. He or she should join you in signing the Estate Commitment.

What about friends or other members of my family?

We cannot count estate commitments contingent upon any other family member or individual predeceasing you.

How do I determine the amount of my estate commitment?

If you note a specific dollar amount and share that with the College, that amount will represent your estate commitment. If you are leaving a percentage of your residuary estate or assets in a retirement plan, Haverford will accept your good faith estimate of what you believe the College will ultimately receive.

May I designate my estate commitment to a specific program or initiative?

Unrestricted estate commitments allow the College to use your gift where Haverford's need is greatest. However, you may designate your estate commitment to a specific purpose. You may also add it to an existing endowed fund. If you choose to restrict your estate commitment, please contact the Office of Gift Planning (see contact information below), which will help to ensure that your wishes are honored.

What happens if my estate cannot fulfill my estate commitment?

Your estate commitment is not legally binding. There would be no obligation on your estate.

Can I make my gift legally binding?

Yes, if you choose. To do so, please request an Estate Note form from the Gift Planning Office.

What happens if I change my estate plan?

We understand that your plans may change in the future. If you make changes that affect your estate commitment, please inform us in writing so that we can update our records.

The Gift Planning Office welcomes the opportunity to answer questions about an estate commitment you may be considering.

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Haverford
COLLEGE

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