

# Estate Gift Confirmation Form



Thank you for documenting your intention to make a gift from your estate to Claremont McKenna College, and allowing us to recognize your leadership and generosity.

This is to confirm that I/We have named CMC as a beneficiary of our estate as described below.

Name of Donor 1: \_\_\_\_\_ DOB: \_\_\_\_\_

Name of Donor 2: \_\_\_\_\_ DOB: \_\_\_\_\_

**Gift type:**  Will Provision  Living Trust Provision  Charitable Remainder Trust  
 Recommendation from a Donor Advised Fund  Life Insurance  
 Retirement Plan  Other \_\_\_\_\_

**A good faith estimate of the current value of my/our bequest to CMC is:** \$ \_\_\_\_\_ (Optional)

This is stated as a:  Specific Dollar Amount  A Percentage \_\_\_\_\_ % (Optional)

**CMC will receive this gift:**

Upon my death.  Upon the death of both myself and my spouse/partner  
 Other: \_\_\_\_\_

**Designation:**

CMC's greatest needs as determined by the Board of Trustees (unrestricted)  
 My/our bequest is to be used in accordance with a signed gift agreement on file with Claremont McKenna College

**1946 Legacy Partners Membership:**

Please list us as: \_\_\_\_\_  
 We prefer to remain anonymous at this time.

**Executor/Personal Representative/Family Member:**

(This is someone whom we may contact in the event of your passing.)

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

It is my/our intention that this estate gift confirmation form is intended to amend and revoke any and all previous estate gift confirmation forms.

\_\_\_\_\_  
Text Typed Signature Date Text Typed Signature Date

*CMC recognizes that this gift is subject to change depending on personal and economic circumstances. This form is **non-binding** and any information you provide will remain confidential.*

Please complete the form, save to your computer, and email to [plannedgiving@cmc.edu](mailto:plannedgiving@cmc.edu)

# Estate Gift FAQs

## **What is an “Estate Gift?”**

An “estate gift” is a gift that the College will receive only after your death, or the death of you and your spouse/partner. It may come through a provision in your will or living trust, or it may come from a retirement plan, life insurance policy or commercial annuity in which you have named the College as a beneficiary.

## **Why make an estate gift rather than make a gift during life?**

Making a gift from an estate often enables donors to make the gift they dream of making but, due to family, retirement or other related financial needs, are unable to make during their lifetime.

## **How do I determine the value of my estate gift intention?**

If your gift will be a percentage of your estate, rather than a specific amount, CMC would appreciate receiving a *good faith estimate* of the value of the gift intention as of the current date.

## **What happens if my estate shrinks and cannot fulfill my intended commitment?**

An estate gift intention is not legally binding. If your estate is unable to fulfill your intended commitment, we will accept whatever remaining funds, if any, are earmarked for CMC.

## **Why does the College want to know about the estate gift I am planning?**

There are many reasons why the College appreciates knowing about your estate gift commitment.

- Most importantly, these types of gifts are often the embodiment and reflection of your goals and values and, as such, have great meaning. We want you to know how much we appreciate your commitment, and be able to thank you while you are living for making such a thoughtful commitment to the College.
- The College wants to be able to assure you that your gift can be used for the purpose you have designated.
- Your gift can be a wonderful inspiration to others, who may not be aware of the magnitude of the impact an estate gift can make in the lives of future CMC students, inspiring them to make an estate gift of their own.
- Estate gifts are often the greatest source of gifts to an institution. Informing the College of your estate gift intention enables the College to have a better understanding of these potential future gifts, as we plan for the future.

## **May I designate my estate gift for a specific purpose?**

While unrestricted estate commitments allow CMC to use your gift where the need is greatest, you may designate your estate gift to a specific program or need, or it can be used to create an endowed fund. If you choose to designate your estate gift, please contact the Office of Planned Giving, which will work with you to ensure that your wishes can be honored.