

Declaration of Future Intent

Bard

Thank you for considering Bard in your estate plans. Information disclosed in this form will remain confidential and is not legally binding.

☐ New Intention

☐ Updated Intention

MY/OUR INFORMATION

Name (print)

Date of Birth

Spouse Name (if joint gift)

Date of Birth

Address

City/State

Country/Postcode/ZIP

Phone Number

Email Address

GIFT INFORMATION

I/We have provided a gift to Bard College as set forth in my/our:

☐ Retirement Plan or Beneficiary Designation (401(k), 403(b), IRA, Keogh, Brokerage Account)

☐ Life Insurance Policy

☐ Charitable Remainder Unitrust

☐ Other Asset(s) (please describe): _____

☐ Bard College is a contingent beneficiary of the indicated asset above (please provide detail):

The current estimated value of my/our gift is \$_____.

My/Our gift is _____% of the asset indicated above.

The current estimated value of the percent in today's dollars is \$_____.

GIFT PURPOSE

☐ Please use my gift for the area of Bard's greatest need.

☐ I/We have signed a Gift Agreement for the use of this gift.

☐ I/We have not signed a Gift Agreement. We wish Bard to use this future gift for the following purpose: _____

RECOGNITION PREFERENCE

All donors who disclose a planned gift to Bard become recognized members of the Margaret and John Bard Society.

☐ I/We prefer to be recognized as follows in any publications: _____

☐ Prefer no public recognition/to remain anonymous

Please continue to the reverse side to complete the form.

ESTATE CONTACT INFORMATION (OPTIONAL)

Executor, Trustee (if your gift is through a Will, Trust)

Name (print)		
Address	City/State	Country/Postcode/ZIP
Phone Number	Email Address	

Asset Administrator (for retirement accounts or insurance policies)

Name (print)		
Address	City/State	Country/Postcode/ZIP
Phone Number	Email Address	

Additional Contact/Relationship (family, attorney, etc.)

Name (print)	Relation	
Address	City/State	Country/Postcode/ZIP
Phone Number	Email Address	

I/We understand this form does not create a binding obligation and any details about my/our gift will remain confidential. Bard College understands that the size of my/our future gift may change.

Signature	Spouse Signature (if joint)	Date

Please return to:
Debra Pemstein, Vice President for Development and Alumni/ae Affairs
Bard College, PO Box 5000, Annandale-on-Hudson, NY 12504-5000
Phone: 845-758-7405 **Email:** mjbs@bard.edu