

# Bradford Alumni Association Bequest Intention

You may be looking for a way to make a significant gift to help further our mission.

A bequest is a gift made through your will or trust. It is one of the most popular and flexible ways to leave a lasting legacy for the Bradford Alumni Association (BAA).

Bequests and other testamentary gifts made by generous alumni and friends have been a significant source of financial support for the Bradford Alumni Association throughout the years. By contributing to this rich tradition of remembrance, you will strengthen the BAA's future financial foundation and continue the third oldest alumni association in the United States.

With the help of an attorney, you can include language in your will or trust specifying a gift to be made to the Bradford Alumni Association. This could be in the form of specific dollar amounts, assets, or a percentage of your real estate. There is also the option of designating the BAA as a full, partial, or contingent beneficiary of your retirement account, pension, or life insurance policy. These gifts help the association by providing for the future and by providing scholarships for deserving students to attend accredited liberal arts college in the United States

Including the Bradford Alumni Association in your bequest intention plan may allow you to do more than you thought possible. While achieving your own personal financial goals, you will be leaving a lasting legacy to charity, gain potential tax advantages, and support the BAA in ways that matter most to you.

## Gift Intention

Please provide the following information and attach a copy of documentation or appropriate language from your will or trust, if available.

Please complete all that apply:

\_\_\_\_\_ I have provided for a bequest to the Bradford Alumni Association in the amount of \$

\_\_\_\_\_ My current estate plan states that the Bradford Alumni Association will receive percent of my estate with a current estimated value of \$\_\_\_\_\_

\_\_\_\_\_ I have named the Bradford Alumni Association as a beneficiary under my Retirement Plan, IRA, or Life Insurance Policy in the amount of \$\_\_\_\_\_.

Note that my bequest depends upon the following contingency:

Please indicate how you would like your name to appear in our Denworth Founders listings:

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(Please note the amount of your intended gift will not be published.)

\_\_\_\_\_ NAME I wish to remain anonymous I understand this form does not bind me or my estate plan to any future donations to the Bradford Alumni Association. I may choose to add, subtract, or revoke this bequest at any time, at my sole discretion.

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SIGNATURE

DATE

SIGNATURE

DATE

## Bequest Intention Sample Bequest Language

"I hereby give, devise and bequeath (a specific asset, such as securities, real estate, or other property) valued at Dollars to the Bradford Alumni Association, a nonprofit organization located at 145 South Bradford Street, North Andover, Massachusetts 01845 Federal Tax ID #04-3524471, for its general purposes or for the following purpose: (ie. Operating funds, scholarship support, programmatic support, etc.).

Confidential Bequest Intention Please complete the following information to help ensure that your wishes are fulfilled, and so that we may recognize and honor you as a member of the Denworth Founders:

Personal  
Information \_\_\_\_\_

NAME:

EMAIL ADDRESS:

PHONE NUMBER

We can help you explore creative ways to leave a lasting impact at the Bradford Alumni Association. Please contact the BAA Office: Kristen Hollenbeck Director Phone: 978-886-4342 E-mail: [Bradfordalumni1803@gmail.com](mailto:Bradfordalumni1803@gmail.com)

Because many variables can change the specifics of planned gifts, donors should review their circumstances and objectives with their attorney and/or financial advisor.