



My Wesleyan Legacy – Wesleyan’s Future

GIFT PLANNING



A rewarding and enduring way to support Wesleyan is to include the University in your will or revocable trust, or as a beneficiary of your retirement plan or life insurance. Each individual legacy contributes to our financial strength and ability to meet the needs of our students and their families. If you have already made a provision to include Wesleyan in your financial planning, please consider notifying us by completing and returning this document.

By documenting your bequest intention, you will give Wesleyan the opportunity to recognize this generous support in your lifetime.

Information provided here to signify your bequest intention to Wesleyan will remain completely confidential unless you authorize the University to publicize your gift. Wesleyan understands that bequest provisions are revocable, and intentions stated here are not binding on you or your estate.

I have made revocable gift commitments for Wesleyan as follows:

Bequest % of estate (% _____) fixed amount Approximate Value: _____

Life Insurance Policy Approximate Value: _____
Name of Insurance Company: _____

IRA or Other Retirement Plan % of plan (% _____) fixed amount Approximate Value: _____
Name of Financial Institution: _____

Other Asset Approximate Value: _____
Description of Asset: _____

I've attached documentation from my will, retirement plan, life insurance policy, or trust

Signature Date Signature Date

Name (please print) Name (please print)

Contact Information – representative of my estate and/or trusted contact:

Name Role

Phone email

Please return your completed form to:

Wesleyan University, Office of Advancement, Gift Planning, 55 High Street, Middletown, CT 06457

mywesleyanlegacy.org | plannedgiving@wesleyan.edu

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