

# MOUNT HOLYOKE

## Fact Sheet Documenting Bequest Intentions

Join hundreds of alumnae and friends who have shared their plans and their legacy with Mount Holyoke College. Informing Mount Holyoke of your bequest intentions gives you an opportunity to:

**Be Confident.** You can ensure that your wishes are understood and followed.

**Be Counted.** Your gift can be celebrated at your next class reunion.

**Lead the Way.** Your gift can inspire others to make Mount Holyoke a part of their legacies.

### Intended gifts eligible for recognition:

- Mount Holyoke named as a noncontingent beneficiary in a will or trust for either a percentage of the estate or a specific dollar amount.
- Mount Holyoke named the primary beneficiary—in full or for a percentage—of a retirement plan (401K, 403B, IRA, etc.), life insurance policy, insurance annuity, or pay-on-death of a bank or brokerage account.
- Gifts of real estate to Mount Holyoke via an estate plan.
- Tangible personal property via an estate plan.

*All gifts of real estate and tangible personal property are reviewed by Mount Holyoke's gift acceptance committee. Contact the Office of Gift Planning if you are interested in documenting a contingent beneficiary.*

**All bequest intentions will be kept in strictest confidence.** Documented bequest values are aggregated and included in overall class totals at reunions. The intended value of individual bequests is not shared.

**A bequest intention is not a legally binding pledge.** If your circumstances change, please contact the Office of Gift Planning to update us about your plans.

### Required documentation:

- Relevant page(s) from will, trust or beneficiary form **and**
- Signed Mount Holyoke *Bequest Intention Form* affirming your gift intention and indicating that Mount Holyoke will be notified if the bequest is changed.

**Eligibility:** Alumnae may begin documenting their intended legacy gifts after their 45th reunion. These gifts will be celebrated as part of the class totals at their 50th—75th reunions. Frances Perkins alumnae, faculty, friends and emeriti may document their intentions beginning at age 70.

### Questions?

Please contact the Office of Gift Planning at 800-642-4483  
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