

# MOUNT HOLYOKE

## Fact Sheet Recognizing Your Bequest

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:

**Express Yourself** Whether sharing the future designation of your legacy gift, or requesting anonymity, you can help to ensure that your wishes are understood and followed.

**Lead the Way** Your gift can inspire others to consider making 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.*

**All bequest intentions will be kept in strictest confidence.** Documented bequest values will be aggregated and included in overall class totals at reunions. The intended value of individual bequests will be not be 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 gift intention and statement that Mount Holyoke will be notified if the bequest is changed.

### Questions?

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