

# Estate Commitment Form

I/we want to provide a legacy of support to Carleton College, and have included a gift to Carleton in my/our estate plan as follows:

\_\_\_\_\_  
Name

\_\_\_\_\_  
Second name (if joint gift)

\_\_\_\_\_  
Preferred phone

\_\_\_\_\_  
Email

## Gift information

- ☐ Will or trust provision ☐ Donor advised fund (DAF) successor beneficiary  
☐ IRA/Retirement plan beneficiary ☐ Other \_\_\_\_\_  
☐ Life insurance beneficiary

## Carleton will receive this gift:

- ☐ Upon my death ☐ Upon the death of the surviving spouse/partner ☐ Other \_\_\_\_\_

## This gift is designated to support:

- ☐ Carleton's greatest needs as determined by the Board of Trustees (unrestricted)  
☐ Existing scholarship fund \_\_\_\_\_  
☐ Please contact me to discuss how my gift could be used

## Gift recognition

If you would like your gift included in your class's 50th Reunion Class Gift and/or the *Every Carl for Carleton* Campaign, and you'll be 70 or older by June 30, 2021, please complete the following two items:

1. This gift is stated as:

- ☐ A specific dollar amount: \$ \_\_\_\_\_  
☐ A percentage of estate/account: \_\_\_\_\_ %  
The estimated current value of this gift is: \$ \_\_\_\_\_  
☐ Other (i.e. gifts of real estate) \_\_\_\_\_

2. The following are attached to document my/our gift provision(s) for Carleton

- ☐ A copy of the will or trust provision (if mirror provisions, both are attached)  
☐ A copy of the account beneficiary designation form, and summary page from a recent statement  
☐ A letter from my attorney, executor, or trustee describing the gift provision  
☐ Other \_\_\_\_\_

Continued on next page ->

## Estate contact information (optional, but very helpful)

Who would you like Carleton to contact upon your death to facilitate the distribution of your gift?

☐ Executor ☐ Trustee ☐ IRA Custodian/Plan administrator ☐ Family member ☐ Other \_\_\_\_\_

Name \_\_\_\_\_

Business \_\_\_\_\_

Address \_\_\_\_\_

Email \_\_\_\_\_ Phone \_\_\_\_\_

### Comments/additional information

Donor signature

Date

Donor Signature (if joint gift)

Date

*Carleton recognizes that this gift is subject to change depending on personal or economic circumstances. This form is not intended to be a legally binding pledge. The information you provide will remain confidential.*

### Please return this form to:

Carleton College Development Office  
One North College Street, Northfield, Minnesota, 55057  
planned-giving@carleton.edu

### Questions? Please contact us:

**Phone:** 800-492-2275 or 507-222-4200

**Email:** planned-giving@carleton.edu • **Web:** giftplanning.carleton.edu

This gift qualifies you  
for membership in the

**JOSEPH LEE  
HEYWOOD  
SOCIETY**