

# Statement of Intent

for the **1839 Society** of  
Longwood University



1839 Society members build a legacy at Longwood University, perpetuating both the University's educational mission, and their own role in carrying on that vital work.

I have included Longwood University Foundation in my estate plans in the following way:

- A bequest in my will or inclusion in my revocable (living) trust for either \$\_\_\_\_\_ or \_\_\_\_\_% of the residuary.
- Designation of part or all of the final balance of my retirement plan account (IRA, 401(k), or other type) for either \$\_\_\_\_\_ or \_\_\_\_\_% of the final balance.
- My charitable remainder trust, dated \_\_\_\_\_, of which Longwood University Foundation is beneficiary of \_\_\_\_\_% of the trust remainder.
- As beneficiary of an insurance policy, with death benefit of \$\_\_\_\_\_, of which \_\_\_\_\_% is designated for Longwood University Foundation.
- My charitable lead trust, dated \_\_\_\_\_, of which Longwood University Foundation is beneficiary of \$\_\_\_\_\_ or \_\_\_\_\_% of the trust's annual payments for a period of \_\_\_\_\_ years.
- Other: \_\_\_\_\_.

This gift is designated as follows:

- Without restriction, for use where need is greatest.
- As endowment, with income unrestricted.
- As endowment, with income designated as follows:

\_\_\_\_\_  
\_\_\_\_\_.

*Continued on other side*



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**CONTINUED**

Name(s): \_\_\_\_\_

Please write your name as you would like it to appear in Society listings

I/we prefer to keep our membership anonymous.

Signature(s): \_\_\_\_\_

\_\_\_\_\_

Date: \_\_\_\_\_

## Contact Information (for internal only):

Name(s): \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Birthdate: \_\_\_\_\_

*This document is intended to signify your intent only, and creates no legal obligation on your part.*

> *Mail this form*

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