



# DECLARATION OF FUTURE INTENT

[citadellegacy.org](http://citadellegacy.org)

**Name**

**Class Year** (if applicable)

Thank you for your intention to include The Citadel in your estate plan. In order to accurately document your intention, please complete this form with as much detail as you are willing to share or contact us with any questions. Any information about your gift will remain confidential and does not create a binding obligation.

**Recognition of Your Gift** – At times, in order to promote support for The Citadel, we appreciate the opportunity to publicize donors’ names and gifts. If the gift is \$25,000 or more this documentation of your deferred gift will entitle you to recognition through The Citadel Legacy Society and have your name listed with other alumni and friends who have established gifts to The Citadel through their estate plans. Depending on the amount or designation of your gift, you may also earn membership in another giving society.

Please indicate below how you would like to be listed:

- Yes, you may list my name and gift information. I would like for my/our name(s) to appear in print as:  
\_\_\_\_\_
- Yes, but list me as “anonymous” if dollar amounts or giving ranges are mentioned.
- No, do not list my gift information.
- No, I do not want my name publicly listed as a member of The Citadel Legacy Society.

**Gift Designation** – Briefly describe allocation, designation, and how your gift should be used to benefit The Citadel.

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**Description and Value of Gift** - Please indicate below (by checking applicable options), how your future gift intention will be fulfilled and provide the estimated value for The Citadel Foundation. For percentage and remainders of an estate, please provide a good faith estimate of the dollar value as of the date this form is signed. The estimate will allow the college to make long-term plans regarding the designated fund or program you wish to support as well as apply this amount to its fundraising goals. The Citadel Foundation recognizes that values of deferred gifts as well as the provisions themselves may change over time.

**Description**

**Amount or Percentage**

**Estimated Amount of Gift to The Citadel Foundation**

- Will or Trust**  
with a sum of \_\_\_\_\_
- Charitable Gift Annuity**  
in the amount of \_\_\_\_\_
- Charitable Remainder Trust**  
in the amount of \_\_\_\_\_
- Remainder of Retirement Fund/IRA**  
with a total current value of: \_\_\_\_\_
- Life Insurance Policy**  
with a policy value at maturity of \_\_\_\_\_
- Other Item or Asset** in the amount of \_\_\_\_\_  
**Please describe** (for example, private collections, real estate, securities, etc.)  
\_\_\_\_\_
- Beneficiary** – If The Citadel Foundation is only a contingent beneficiary, please explain conditions.  
\*Please note that contingent beneficiary gifts are usually not eligible for induction in The Citadel Legacy Society.
- Documentation** - Copies of any documents (or the relevant pages) that include provisions for The Citadel Foundation are required for gift acceptance.

**Contact Information:**

**Will or Trust** – If your gift is included in a will or trust, please provide the following:

**Executor(s) or Trustee(s)**

Name and Address

Phone and/or Email

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Beneficiary Designation** – If your gift is directed by a beneficiary designation, please provide the following:

**Administrator or Company**

Name and Address

Phone and/or Email

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Other Information, Contacts and Relationships You Want Us to Know (family, attorney, etc.)**

Name and Address

Phone and/or Email and Relationship

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**New Intention** – This is a new bequest intention to The Citadel Foundation.

**Update to Intention** – This is an update to a previously recorded bequest intention to The Citadel Foundation.

\_\_\_\_\_  
Signature Date

\_\_\_\_\_  
Signature Date

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Street Address

\_\_\_\_\_  
Street Address

\_\_\_\_\_  
City, State, Zip

\_\_\_\_\_  
City, State, Zip

\_\_\_\_\_  
Email and Phone Number

\_\_\_\_\_  
Email and Phone Number

\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
Date of Birth

*(Dates of birth are useful in assigning a current value to your gift based on life expectancy tables)*

**Please send this form** (together with copies of any relevant documents) to the Office of Legacy Giving. Please contact us if you have any questions or concerns at the numbers below.

**The Citadel Foundation, Office of Legacy Giving**  
171 Moultrie Street, Charleston, SC 29409  
Email: [legacygiving@citadel.edu](mailto:legacygiving@citadel.edu)  
Phone: 843-953-2404  
Fax: 843-953-7689

*\*The Citadel Legacy Society is open to individuals who have included The Citadel in their estate planning with a gift of \$25,000 or greater and who provide the college with documentation of their gift. Per The Citadel Foundation's gift acceptance policy, all gifts shall be approved by The Citadel Foundation prior to acceptance.*