



**PLANNED GIFT INFORMATION FORM**  
*CONFIDENTIAL AND NON-BINDING*

\_\_\_\_\_  
Name School(s) and Year(s)

\_\_\_\_\_  
Street Address, City, State, Zip Code

\_\_\_\_\_  
Telephone Email Address Date of Birth

\_\_\_\_\_  
Spouse's Name Spouse's Date of Birth

**I/We desire to support Boston University and would like to share that I/we have made provision for Boston University in my/our estate plans as follows:**

\_\_\_\_\_ Will Charitable Trust  
\_\_\_\_\_ Trust Life Insurance Policy  
\_\_\_\_\_ IRA or Retirement Account Other (please specify):  
\_\_\_\_\_ Donor-Advised Fund \_\_\_\_\_

**Gift Amount: \$** \_\_\_\_\_

For provisions reflected as percentages and remainders, please provide a good-faith estimate of the current gift value (at the time of this declaration)

**Gift Designation:** \_\_\_\_\_

- Yes, please welcome me/us into the Claflin Society and include me/us in member lists
- Yes, please welcome me/us into the Claflin Society, but I/we prefer to remain anonymous
- No, please do not welcome me/us into the Claflin Society

**Any additional information you would like to share with us (contingency provisions related to the gift, contact information of your estate planning advisor, etc.):**

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

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

**Thank you for your support.** We recognize that your circumstances and the estimated gift values you provide can change over time and we appreciate details of your arrangements to help us insure that your wishes are followed. We would welcome for our confidential records a copy of the section of your will, trust agreement, or other documents pertaining to Boston University. Having this information on file will help us to fulfill your philanthropic wishes.