



Confidential Bequest Intention Form

The American College of Financial Services is grateful that you have decided to inform us of your intention to make a legacy gift to support the future of The College. Please use this confidential bequest intention form to share your intention. The details you provide will remain confidential. Thank you.

Contact Information

The professional Advancement staff at The American College is available to assist you as needed. Please contact us at 610-526-1339 or advancement@theamericancollege.edu.

Legal Language

The American College should be named as a beneficiary in legal documents or financial accounts as follows:

The American College
630 Allendale Road, Suite 400, King of Prussia, PA 19406
Tax ID: 23-1352008

Donor Contact Information

Name: _____ Name: _____
Birthday: _____ Birthday: _____
Address: _____
City, State, Zip: _____
Email: _____ Phone: _____

Section to be completed by The College

Received by: _____ Title: _____
Date: _____ Constituent ID: _____
Fund: _____ Notes: _____

Legacy Gift Details

When planning your legacy you need to consider how you would like your gift to be used to benefit The College in the future—whether you wish to designate your gift to The College’s greatest needs or to a specific program. We are happy to offer suggestions. Please indicate your gift designation(s) below:

By making your intention known you become a member of the **Legacy Society**. *The nature and size of your gift will be kept strictly confidential*. Please indicate your preference below:

- I am willing to be listed as a Legacy Society member I prefer to remain anonymous for this gift

Please list name(s) as: _____

Type of Bequest: Please check all that apply and estimate the value of your intention in today’s dollars. If you have named The College as a percentage beneficiary, please the dollar value of The College’s percentage.

- Will/Living Trust: \$ _____ Life Insurance policy: \$ _____
 Retirement plan/IRA: \$ _____ Real estate (describe below): \$ _____
 Charitable remainder trust: \$ _____ Other asset (describe below): \$ _____

Is this gift to The College contingent on another beneficiary surviving you? No Yes (please explain)

I/We understand this form does not constitute a legal obligation and will not be legally binding in any way on myself/ourselves, my/our heirs or my/our estate. I/we will attempt to inform The College should I/we change my/our intent or should the dollar value (or percentage) of my/our estate significantly increase or decrease.

Signature: _____ Date: _____

Signature: _____ Date: _____

Please return the completed form to: The American College, Attn: Anne Marie Gallagher, Advancement and Alumni Relations, 630 Allendale Road, Suite 400, King of Prussia, PA 19406.