

Lebanon Valley College

Bequest Intention Form

My/our current intention is to include Lebanon Valley College in our estate plan in the following manner:

- Outright bequest (fixed dollar amount): \$ _____ to LVC
- Percentage of the estate to LVC: _____%, estimated current value of the portion: \$ _____

By naming Lebanon Valley College as a beneficiary:

- in a will or living trust (Executor: _____)
- in a retirement plan – IRA, 401(k), 403(b), etc. (Administrator: _____)
- in a bank/investment account (Institution: _____)
- in other: _____

With the following intended purpose for my planned gift:

- Where the need is greatest
- For a specific purpose: _____

Other Details: _____

I/we retain the right to change our minds as to our designation of LVC as a beneficiary, as to the purpose of our planned gift, and as to the portion and/or amount of our estate currently designated for LVC.

The College is pleased to recognize planned giving donors to LVC with membership in The Miles Rigor Society. However, if you wish to remain anonymous regarding this intended gift, check this box:

Signature _____ Date _____

Signature _____ Date _____

Please consider attaching current documentation of your planned gift to LVC for our records.

Name _____ LVC Class Year _____

Name _____ LVC Class Year _____

Address _____

City _____ State _____ Zip _____

Email _____ Phone _____

See Reverse Side for Additional Instructions

Rev. 10.31.2016

Sample Bequest Language

The provision in your will or revocable living trust providing for a gift to Lebanon Valley College should reflect your own unique circumstances and charitable objectives. We hope these samples will be helpful to you and your attorney.

Unrestricted Gift:

"I, (name), of (city, state, ZIP), give, devise and bequeath to Lebanon Valley College (written amount or percentage of the estate or description of property) for its unrestricted use and purpose."

Gift for a Specific Purpose:

"I, (name), of (city, state, ZIP), give, devise and bequeath to Lebanon Valley College (written amount or percentage of the estate or description of property) for the following purpose: [*a specific purpose, such as providing for scholarship support to students or supporting a particular program of the College*]. If at any time in the judgment of the College it is impossible or impracticable to carry out the purpose I have designated, the College shall determine an alternative purpose as near as possible to the designated purpose."

Gift from Investment or Retirement Accounts:

You may choose to designate Lebanon Valley College as beneficiary of all or part of your investment account or retirement account. The form may ask for LVC's tax identification number, which is 23-1352354, address (located below), and/or institutional charter date which is February 23, 1866.

For information of additional assistance, please contact:

Joseph A. Martellaro, Director of Gift Planning, martella@lvc.edu, 717-867-6323

Please return this completed form to:

Lebanon Valley College
Office of College Advancement
101 N. College Avenue
Annville, PA 17003-1400