



The SUNY Cobleskill Heritage Society Planned Gift Intention Form

Thank you! Your gift will have a lasting impact on SUNY Cobleskill. The information you provide to the Foundation in this form will help the College in its long term strategic planning and will remain confidential unless you authorize the Foundation to publicize your gift. Publicizing your gift encourages others, by means of example, to make similar gifts. The SUNY Cobleskill Heritage Society recognizes and honors generous alumni and friends who have made a commitment to the College through their estate planning. All donors of planned gifts qualify for membership in the society. Again, thank you for your generosity.

Information about your gift

Name of the person who has made the gift

Address

City

State

Zip/Postal Code

Please indicate preferred contact information:

Home Phone

Mobile Phone

Office Phone

Email Address

Date of Birth

Purpose of your gift

- I would like the College to use this gift in the way that has the greatest impact on the students and the College's long-term goals.
- I have completed a gift agreement that governs the use of these funds.
- I would like to direct this gift to the following department, purpose or use: _____

Form and amount of your gift

I have provided for SUNY Cobleskill in my estate plans in the following way: _____

- Through a bequest in a will or revocable trust
- Through a Charitable Gift Annuity
- As a beneficiary of an IRA, 401(k), or other retirement plan
- As a beneficiary of a life insurance policy
- As a beneficiary of a charitable remainder trust
- As a beneficiary of a charitable lead trust
- Other (please describe): _____

For more information,
please contact:

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SUNY Cobleskill
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My gift is for a specific dollar amount of \$ _____ , or for a percentage (%) of _____

The greater of the two amounts

I estimate the value of my gift to be \$ _____

I authorize the SUNY Cobleskill Foundation to use my name on lists and in publications in recognition of my support of SUNY Cobleskill as a member of The SUNY Cobleskill Heritage Society. Please list my name as: _____

I prefer to remain an anonymous member of **The SUNY Cobleskill Heritage Society.**

SIGNATURE

DATE

SUNY Cobleskill FOUNDATION

You have worked hard to accumulate assets throughout your life, and you are the one to decide how your estate will be distributed. Giving to charity through a bequest or other planned gift is a meaningful way to establish a legacy. A charitable gift in your estate plan is easy to set up, can be changed in the future, and has valuable tax benefits. You can create the gift today, but the actual donation will occur only after your lifetime. You retain the money and assets and give them to charity only after your needs are met.

Make a Bequest In Your Will or Revocable Trust: Unrestricted Gifts

General Bequest. “I give and bequeath the sum of _____ Dollars (\$____) to the SUNY Cobleskill Agriculture and Technology College Foundation, Inc. (Federal ID # 23-7106325), located in Cobleskill, NY for its general and unrestricted use.”

Residuary Bequest. “I give and bequeath ____ percent (____%) of the rest, residue and remainder of my estate to the SUNY Cobleskill Agriculture and Technology College Foundation, Inc. (Federal ID # 23-7106325), located in Cobleskill, NY for its general and unrestricted use.”

Specific Asset Bequest. “I give and bequeath _____, to the SUNY Cobleskill Agriculture and Technology College Foundation, Inc. (Federal ID # 23-7106325), located in Cobleskill, NY for its general and unrestricted use.”

Make a Bequest In Your Will or Revocable Trust: Restricted Gifts

Is there a particular department, purpose or use that you would like to support with your bequest? Please contact our office for bequest language for restricted gifts. We look forward to working with you to help ensure that your wishes are honored.

“Insure” Your Gift

To make a gift through a life insurance policy to the College, just request a “Change of Beneficiary” form and list “SUNY Cobleskill Agriculture and Technology College Foundation, Inc. (Federal ID # 23-7106325).” You can also donate a paid-up policy that is no longer needed to the College. By making us the owner of the policy, you could qualify for a tax deduction.