

Simmons UNIVERSITY

DEFERRED GIFT INTENTION FORM

Simmons University sincerely appreciates your generous commitment to our community. Once we have received your documented estate gift intentions, we will be pleased to welcome you as a valued member of the **John Simmons Society**.

Donor Information

Name(s)

Address

Phone number

Email

Type of Estate Provision

- | | |
|--|--|
| <input type="checkbox"/> Will or codicil | <input type="checkbox"/> Revocable living trust |
| <input type="checkbox"/> Testamentary trust | <input type="checkbox"/> Charitable remainder trust |
| <input type="checkbox"/> Life insurance policy | <input type="checkbox"/> IRA or retirement account beneficiary designation |
| <input type="checkbox"/> Donor-advised fund | <input type="checkbox"/> Other (please specify): _____ |

Designation

- Unrestricted: Simmons University may use this gift where it is needed most.
- Other (e.g., scholarship, a specific school/program, etc.): _____
- *If, at the time this gift is received, the original purpose has become impossible or impracticable, Simmons University may, in its reasonable discretion and in accordance with applicable law, apply this gift to a purpose that most closely aligns with your original intent.*

Gift Structure

- Specific dollar amount: _____
- Percentage of estate: _____
- Residual

For provisions reflected as percentages or residuals, please provide a good-faith estimate of the current gift value at the time of this declaration: _____

- Simmons University is a primary beneficiary.
- Simmons University is a contingent beneficiary.

Attorney/Advisor Information (if applicable)

Attorney/Advisor Name

Firm Name

Phone number

Email

Recognition Preferences

- I/we would like to be recognized in John Simmons Society materials.
- I/we prefer to remain anonymous in public listings.

Preferred recognition listing name(s):

I/we are inspired to make this gift because:

Documentation

To ensure we accurately understand your intentions, we welcome a full copy or excerpt of the relevant provision(s) naming Simmons University as a beneficiary. Providing documentation is optional but helps us appropriately steward your gift, now and in the future.

Simmons University recognizes that personal circumstances and the estimated value of your gift may evolve over time. This form is intended solely to document your current estate gift intentions and is not a legally binding obligation. You may modify or revoke your plans at any time.

Signature

Date Signed

Signature

Date Signed

For more information, please contact the Office of Planned Giving.
Phone: 800-831-4284 | Fax: 617-521-3791 | Email: planned@simmons.edu