

# Swarthmore College Legacy Challenge

When you make a gift that matures in the future—such as a gift in your will or one that provides you with lifetime income—Swarthmore will receive up to \$10,000 in matching funds for financial aid.

## Section 1: Legacy Circle Recognition

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

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

I/We wish to be listed as \_\_\_\_\_  
in any donor recognition materials.

I/We prefer to remain anonymous and do not wish to be publicly recognized at this time.

## Section 2: Legacy Gift Type and Designation

**I/we have named Swarthmore College as a beneficiary in my/our:**

- Will or Trust
- Retirement Plan
- Life Insurance Policy
- Donor-Advised Fund
- Other \_\_\_\_\_

**Swarthmore will receive this gift:**

- Upon my death
- Upon the death of \_\_\_\_\_

**I/We would like this gift to support:**

- Swarthmore's greatest needs (unrestricted)
- Existing scholarship fund: \_\_\_\_\_
- Department or program: \_\_\_\_\_
- Please contact me/us to discuss how my/our gift could be used.

**The gift is stated as:**

- A specific dollar amount: \$ \_\_\_\_\_
- A percentage: \_\_\_\_\_ % with an estimated value of: \$ \_\_\_\_\_

## Section 3: Additional Information

**I/We have included:**

- A copy of the will or trust provision pertaining to Swarthmore College
- A copy of the beneficiary designation form
- The summary page from a recent statement (for a retirement account or life insurance gift)
- A letter from my/our attorney, executor, or trustee
- Other \_\_\_\_\_

*This form is not a legally binding pledge and Swarthmore College recognizes that this gift may be subject to change.*



## Estate Gift FAQs

Estate gifts provide critical support to the College. The generosity of alumni and friends who have included Swarthmore in their estate plans help secure the future of Swarthmore and ensures the College can continue to change the lives of students who will change the world for generations to come. Thank you for considering a gift to provide for the future of Swarthmore College.

### What is an estate gift?

An estate gift is a gift that Swarthmore will receive at a future date. It may come from a will, trust, retirement plan, life insurance policy, or annuity, where you designate an entity (in this case, Swarthmore) to receive the remainder. Other gifts to be realized in the future may also qualify, and we welcome your questions about them.

### Why is Swarthmore counting estate gifts in its fundraising campaign?

Swarthmore wishes to recognize the importance and impact of estate gifts during the donor's lifetime.

### How can my estate gift be counted in Swarthmore's campaign?

To have your estate gift count in the campaign, you must:

- (1) reach age 60 before June 30, 2020,
- (2) complete and sign the estate gift form (see reverse side), and
- (3) provide documentation for your estate gift.

### My estate gift to Swarthmore will only become effective if my spouse/partner predeceases me. Can my gift still count in the campaign?

Yes, as long as your surviving spouse or partner also includes a provision for Swarthmore in their estate plan and they join you in signing the estate gift form.

### What about friends or other members of my family?

We cannot count estate gifts that are contingent upon any other family member or individual predeceasing you.

### How is my estate gift counted?

If you give a specific dollar amount to the College, that amount will represent your estate gift and be counted in the campaign. If you are leaving a percentage of your residuary estate or assets in a retirement plan, Swarthmore will accept your good faith estimate of what you believe the College will ultimately receive.

### May I designate my estate gift to a specific program or initiative at Swarthmore?

Unrestricted gifts allow the College to use your gift where the need is greatest. However, you may designate your estate gift to a specific program or campaign initiative such as financial aid. You may also add it to an existing endowed fund. If you choose to restrict your estate gift, please contact us to ensure that your wishes can be honored.

### What happens if I change my estate plan or if my estate gift cannot be satisfied?

This form is not legally binding and we understand that your plans or circumstances may change in the future. If your estate gift cannot be satisfied in full, we will gratefully accept any remaining amount or portion that is earmarked for Swarthmore. If you make changes that affect your estate gift, please let us know so that we can update our records.

### Where do I return this form?

Please return this form along with any supporting documentation via mail to:

**Swarthmore College**  
**Attn: Renée P. Atkinson**  
**500 College Avenue**  
**Swarthmore, PA 19081**

*Although the Office of Individual Giving cannot offer legal or tax advice, we welcome the opportunity to answer any additional questions about an estate gift you have made or may be considering: [giftplanning@swarthmore.edu](mailto:giftplanning@swarthmore.edu) or 866-526-4438 (toll-free).*