



**Simmons University**  
**Bequest Letter of Intent**  
*CONFIDENTIAL*

I/We, \_\_\_\_\_, desire to support Simmons University and to encourage others to do likewise. Therefore, in addition to gifts which have already been made to Simmons University or may be made in the future, I/we hereby declare that I/we have made provision for Simmons University in my/our estate plans as follows:

I/We have made provision for Simmons University through a:

- |  |  |
|--|--|
| <input type="checkbox"/> Will                  | <input type="checkbox"/> Life Insurance Policy         |
| <input type="checkbox"/> Testamentary Trust    | <input type="checkbox"/> Other (please specify): _____ |
| <input type="checkbox"/> IRA or Retirement     |  |
| <input type="checkbox"/> Account Donor-advised |  |
| <input type="checkbox"/> Fund Charitable Trust |  |

Gift Amount: \$\_\_\_\_\_\* Designation: \_\_\_\_\_  
 \_\_\_\_\_

\*For provisions reflected as percentages and remainders, please provide a **good-faith estimate** of the current gift value (at the time of this declaration):

Please welcome me/us into the John Simmons Society:

- I/We may be listed as a member  
 I/We prefer our estate commitment to remain Anonymous

Other information you would like to share with us (e.g. any contingency provisions related to the gift, contact information of your estate planning advisor, etc.):

\_\_\_\_\_  
 \_\_\_\_\_

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

Please list my name for recognition purposes as follows:

\_\_\_\_\_

*We recognize that your circumstances and the estimated gift values you provide can change over time and we appreciate details of your arrangements to help us insure that your wishes are followed. We would welcome for our confidential records a copy of your Will or Trust or the appropriate section(s) thereof in order to assure our continued ability to fulfill your intentions. Thank you.*

For more information, please contact: Simmons University, Office of Planned Giving, 300 The Fenway, Boston, MA 02115; telephone: 800-831-4284; fax: 617-521-3791; email: [plannedgiving@simmons.edu](mailto:plannedgiving@simmons.edu)



## **Tell Us Your Story**

We encourage you to tell us what inspired your gift and how you would like your bequest designated. Please tell us your story so that we may honor your philanthropic wishes.

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Simmons University  
Office of Planned Giving  
300 The Fenway  
Boston, MA 02115