

ROBERTS WESLEYAN UNIVERSITY

Planned Giving Agreement Form

As evidence of my/our desire to support the mission of Roberts Wesleyan University and Northeastern Seminary, I/we hereby inform these institutions that I/we plan to provide a gift.

Name: _____ Address: _____

City: _____ State: _____ Zip _____

Code: _____ Phone: _____ Signature: _____

_____ Date: _____

I/we are choosing to remember Roberts and Northeastern in our estate plan for the following reasons (Please explain why you wish to provide for the mission of these institutions):

It is my/our intent to include Roberts Wesleyan University and/or Northeastern Seminary in my/our estate plans through:

☐ Will ☐ Living or Charitable Remainder Trusts ☐ Retirement Plan Assets ☐ Charitable Gift Annuity ☐ Life Insurance Policy ☐ Designated beneficiary ☐ Other _____

I/we wish to inform these institutions for long-term planning purposes only, that as of this date, the value of my/our gift is: \$ _____. (If your gift is a percentage of your estate, please indicate the approximate present value of that percentage). I/we understand that, by stating an amount, my/our estate is not legally bound by this statement and I may choose to add, subtract, or revoke this bequest at any time, at my/our sole discretion. Further, this commitment is revocable and not legally binding, but I would like to inform the institutions for their long-term planning purposes.

I would like this gift to be designated to the following locations:

☐ Where the need is greatest ☐ A new expendable scholarship (\$5,000 minimum) ☐ A new endowed scholarship (\$25,000 minimum) ☐ Roberts or Northeastern Fund ☐ An existing scholarship(s) ☐ Other:

Please note that if a designation is not mentioned, our practice is to allocate estate gifts to quasi-endowment. If you would like your gift to be split into multiple areas or have other requests (e.g. anonymity), please indicate below:
