

# WINTHROP UNIVERSITY

## **Confidential Statement of Bequest Intention**

Many loyal Winthrop University alumni have included Winthrop in their estate plans. Bequests play a significant role in the fiscal well-being of the University.

Bequests can help Winthrop increase its endowment which is a critical component of assuring the University's financial integrity. Some donors have established scholarships or added to existing scholarships. There are many opportunities to match your interest with the needs of the Winthrop community.

*The Society of 1886* recognizes individuals who have included Winthrop in their estate plan. There are many who have included Winthrop in their plans but have not yet notified us. We would like to include you in the membership of *The Society of 1886* to recognize you and to inspire others.

To assist us with our records, please complete the Confidential Statement of Bequest Intention. It will allow us to assist you in benefiting future generations of Winthrop University students.

Please return the Confidential Statement of Bequest Intention to:

Laurie Foster Nortz  
Senior Philanthropic Advisor for  
Planned Giving  
Winthrop University  
638 Oakland Ave., Sykes House  
Rock Hill, SC 29733

For more information regarding your bequest or establishing a bequest, please contact Laurie Nortz 803-323-2150 or [nortzl@winthrop.edu](mailto:nortzl@winthrop.edu).

**CONFIDENTIAL STATEMENT OF BEQUEST INTENTION**

**Type of Provision**

**Estimated Value  
(In Today's Dollars)**

I have made a provision for Winthrop University in my estate plans as follows:

- a. Outright bequest in my Will (Donor's birth date \_\_\_\_\_) \$ \_\_\_\_\_
- b. Provision in my Will of \_\_\_\_\_% or rest and remainder of my estate  
I estimate the present value for Winthrop University to be: \$ \_\_\_\_\_
- c. Trust with Winthrop University the/a beneficiary  
I estimate the present value for Winthrop University to be: \$ \_\_\_\_\_
- d. Insurance proceeds with Winthrop University the/a beneficiary  
I estimate the surrender value for Winthrop University to be: \$ \_\_\_\_\_  
This value is: \$ \_\_\_\_\_ Current Cash Value \$ \_\_\_\_\_ Policy Face Value
- e. Other (please describe) \_\_\_\_\_ \$ \_\_\_\_\_

If this provision is restricted to a specific area of the University or a specific use please describe:

\_\_\_\_\_

\_\_\_\_\_

*Attachments or letters that further describe the nature of the above provision(s) are welcomed. Also, that section of your Will, Trust Agreement or other documents pertaining to these provision(s) would be appreciated.*

In the event of unforeseen circumstances that require any future change in the above estate planning provision(s), I agree to notify the University of such a change.

(Date) \_\_\_\_\_ (Signature) \_\_\_\_\_

(Date) \_\_\_\_\_ (Spouse's Signature) \_\_\_\_\_

Please print your name(s) exactly as you would like to have it appear in publications.

(For example: Mary A. Jones **OR** Thomas and Mary Jones **OR** Mr. and Mrs. Thomas H. Jones, III)

Name(s): \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Home Phone Number: \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

Winthrop University Class of (alumnus): \_\_\_\_\_

Relationship to University (non-alumnus): \_\_\_\_\_