



# Cornell College

## Statement of Deferred Gift Provision - CONFIDENTIAL

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Planned/Deferred gifts have been a cornerstone of Cornell's financial success and stability. The college is deeply grateful to each and every donor for this special expression of loyalty and support.

**Yes, I/we have made a deferred gift provision for Cornell College in my/our estate plans.**

I/we have provided for Cornell in my/our:

- Bequest / Will / Living Trust
- Charitable Trust

- Retirement Plan
- Life Insurance Policy
  - Cornell College is owner & beneficiary
  - Cornell College is beneficiary only

- Charitable Gift Annuity
- Other: \_\_\_\_\_

### Information About Your Gift Intention

By completing this form, you can help to ensure that your gift intentions are understood and can be fulfilled according to your wishes. The information you provide to Cornell College is strictly confidential.

*I/We have made the following provision for Cornell College:*

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### Directing Your Gift

If there are specific initiatives that you support and to which you would like to direct your gift, please indicate below. Terms should be reasonably broad and flexible in order to maximize their impact on the college.

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*I desire to have my eventual gift support the initiative outlined above. I understand that at the time of my gift, if circumstances have changed so significantly that it is no longer practical to use my gift in this manner, Cornell College shall retain the right to use my gift for other purposes that most closely fit my original intent.*

### Documentation *(Encouraged, but not required)*

- Attached is a copy of the relevant portions of my will, beneficiary designation form, or other planned/deferred gift documentation that includes Cornell College.*

## Estimating the Value of Your Gift

Estimating the current value of your gift provision(s) assists Cornell with its long-term financial and programmatic planning. The college understands that there are various factors that might affect the eventual amount of your gift.

*With understanding that values are subject to change, the current estimated value of my/our gift provision(s) is:*

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*Unless the specific type of planned/deferred gift is irrevocable, it is understood that this statement is not binding upon the donor(s) or his/her/their estate as to the value or the receipt of the provision herein described.*

## Recognition

The Heritage Society recognizes those alumni and friends who have remembered the college through their wills, trusts, or other planned/deferred gifts. With each new member, the circle of future support for the college grows. Your commitment today will inspire others to give and ensure that future generations of Cornell students will benefit from a strong and vibrant institution.

*You may include my/our name(s) in the Heritage Society. Please list as:* \_\_\_\_\_

*I prefer for this gift to remain anonymous and do NOT wish to be listed as a member of the Heritage Society.*

### Please return this completed form to:

Office of Alumni & College Advancement  
Cornell College  
600 First Street SW  
Mount Vernon, IA 52314

For more information, please contact Tom Hanschman '88, Director of Planned Giving at (319) 895-4335 or [thanschman@cornellcollege.edu](mailto:thanschman@cornellcollege.edu).

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*Signature*

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*Signature*

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