ROSE-HULMAN
INSTITUTE OF TECHNOLOGY

**How to Notify Rose-Hulman Institute of Technology of Your Estate Gift Plans**

To formalize your estate gift plans, we would like to know what you would like your deferred gift to accomplish at Rose-Hulman Institute of Technology ("Rose-Hulman"), a brief description of the type of estate gift, and your written estimate of the current value of your estate destined for Rose-Hulman. It is useful, but not mandatory, for us to receive a copy of the relevant section(s) of your estate documentation.

*We recognize that this does not constitute a binding commitment*. It simply permits us to record your estimated gift, recognize you for this intention, and more effectively manage the gifting process at the time of your estate settlement.

To notify Rose-Hulman of your estate intentions:

- Complete and sign the form below
- Retain a copy for yourself
- Return the original along with, if possible, a copy of the relevant sections of your estate documentation (*e.g.*, will or trust)

After you notify us of your estate intentions, you will be invited to become a member of the *1874 Heritage Society*—which recognizes donors who have made planned gifts or who have included Rose-Hulman in their estate plans.

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## Estate Gift Plans

Gift Purpose: I would like my support to accomplish— _____

_____

As an indication of my support for Rose-Hulman Institute of Technology ("Rose-Hulman"), I am pleased to confirm that I have made a provision for Rose-Hulman as follows (select all that apply):

- ❒ Bequest in my **Will**
- ❒ Provision in my **Revocable Living Trust**
- ❒ Establishment of a **Charitable Remainder Trust** held outside of Rose-Hulman
- ❒ Beneficiary designation in my **Qualified Retirement Plan** or **Commercial Annuity**
- ❒ **Life Insurance** Gift
- ❒ Other (please describe) _____

I estimate the current value of my provision to be approximately $_____.

Printed Name: _____ Class Yr/Age: _____

Signature: _____ Date: _____

Printed Name: _____ Class Yr/Age: _____

Signature: _____ Date: _____

Street _____ City: _____
State ____ Zip _____ E-mail _____
Telephone _____(H) _____(W) _____(C)

Rose-Hulman Institute of Technology recognizes that the value may change due to unforeseen circumstances. This information will be used only to help Rose-Hulman project potential future financial support and *is not considered a legally binding obligation*.

I worked with the following advisor to establish this estate provision:
Name_____ Profession _____
Company/Address_____
City _____ State _____ Zip _____

***Thank you for generously supporting Rose-Hulman Institute of Technology.***

***Please mail this form to:***
Rose-Hulman Institute of Technology, Office of Planned Giving
5500 Wabash Avenue, Terre Haute, IN 47803