



## The Heritage Society at Cazenovia College Membership Form

Please complete the following information so we may appropriately recognize your generosity. We understand that as circumstances change, you may alter your plans to meet your needs and those of your family.

Name: \_\_\_\_\_ Class Year: \_\_\_\_\_

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

Phone Number: \_\_\_\_\_ E-mail address: \_\_\_\_\_

- I/We wish to be referred to as \_\_\_\_\_ in donor recognition materials.
    - Date(s) of Birth (optional) \_\_\_\_\_
  - Include my spouse \_\_\_\_\_ as a member.
  - I prefer to remain anonymous and do not wish to be recognized publicly at this time.
- 

### The following optional information will help us plan for the future:

I/We are pleased to acknowledge that I/we have named Cazenovia College as a beneficiary in my/our:

- |  |   |
|--|---|
| <input type="checkbox"/> Will/Living Trust                 | <input type="checkbox"/> Charitable Remainder Trust |
| <input type="checkbox"/> Retirement Plan                   | <input type="checkbox"/> Charitable Gift Annuity    |
| <input type="checkbox"/> Life Insurance Policy             | <input type="checkbox"/> Pooled Income Fund         |
| <input type="checkbox"/> Payable/Transfer on Death Account | <input type="checkbox"/> Other _____                |
| <input type="checkbox"/> Donor Advised Fund                |   |

My gift is:

- Unrestricted
- Designated specifically for: \_\_\_\_\_
- Not yet determined. Please contact me to discuss options.

The estimated value of my gift is:

- \$ \_\_\_\_\_
- \_\_\_\_\_ % of my estate, currently valued at \$ \_\_\_\_\_ for Cazenovia College.
- \_\_\_\_\_ % of my retirement plan/life insurance, currently valued at \$ \_\_\_\_\_ for Cazenovia College.

**Please sign and date this form and return it to The Heritage Society, Institutional Advancement,  
22 Sullivan Street, Cazenovia, NY 13035.**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

*Thank you for providing for the future financial strength of Cazenovia College with a gift in your estate plans.*