



Estate Gift Planning Form

Fill out the form below and mail to:

WVSOM Foundation | 400 Lee Street North | Lewisburg, WV 24901

Future commitments, such as intended bequests and beneficiary designations, play a critical role in ensuring excellence at WVSOM for generations to come. The Foundation, in partnership with WVSOM, seeks to recognize your generous commitment and work with you to ensure your philanthropic intentions are met.

In order to achieve this objective, we kindly ask that you provide us with the following information:

Name: _____

Birthdate (MM/DD/YYYY): _____

PLEASE ATTACH A COPY OF YOUR ESTATE DOCUMENT (WILL/TRUST) OR BENEFICIARY DESIGNATION TO THE WVSOM FOUNDATION.

Recommended Language:

"I leave (% of estate, \$ amount, residue) to the WVSOM Foundation, a not-for-profit corporation (Tax ID 51-0163180) located in the State of West Virginia, to support (program/need/endowment/unrestricted fund)."

*We encourage you to contact us to further designate your estate provisions for a specific purpose.

Estimated value of your estate commitment: _____

If the bequest is included as part of your spouse's/life partner's estate plan and will not be realized until the death of the surviving spouse/partner, please provide copies of your spouse's/partner's documents.

PLEASE ATTACH A COPY OF SPOUSE/PARTNER DOCUMENTS.

Spouse/partner name: _____

Spouse/partner birthdate (MM/DD/YYYY): _____

Please check this box if you wish for your estate provision to be anonymous.

Signature: _____

Date: _____

Spouse/Life Partner Signature: _____

Date: _____

Note: Your signature does not affect your ability to change or cancel your gift plans. The "estimated value" of your future gift is in no way binding. Providing information about your estate plan designation will help us accurately administer your gift and ensure that your wishes are carried out as you intend. This information will be held in confidential files with the WVSOM Foundation, Inc.

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