



Planned Gift Form

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

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 (IF APPLICABLE).

Type of gift: Estate Life insurance Charitable remainder trust Retirement account

Recommended language:

“I leave (Percent of estate, dollar amount, residue) to the WVSOM Foundation, a nonprofit 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.

Spouse's/partner's name: _____

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

I wish for this gift to remain anonymous. I understand that this gift will not be listed in any institutional publications.

Signature: _____

Date: _____

Spouse's/partner's 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.

Return form to:
WVSOM Foundation
Attn: Donette Mizia
400 Lee Street North
Lewisburg, WV 24901



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