



Office of Institutional Advancement | 40 Avon Street, Keene, NH 03431 | www.antioch.edu

BEQUEST INTENTION

INCLUDING ANTIOCH IN YOUR ESTATE PLAN

Bequests and other testamentary gifts by generous alumni and friends have been a source of financial support for Antioch University for many years. The continuation and expansion of this tradition of remembrance will contribute to the University's future financial strength and continued academic excellence.

You can make a specific gift to Antioch of cash, securities, real estate, or other property through your will, codicil, or trust instrument. You can also designate Antioch as the beneficiary of all or part of the remainder of your estate or trust after the payment of estate-related expenses, other bequests, or following the death of a spouse or other primary beneficiaries. Another way to include Antioch in your estate plan is to name the University as a beneficiary of your retirement plan or life insurance policy.

A bequest or trust provision for the benefit of Antioch may qualify your estate for an estate tax charitable deduction.

SAMPLE TESTAMENTARY LANGUAGE

"I give (_____ dollars) or (a specific asset, such as securities, real estate, or other property) or (all) or (_____ percent of the rest, residue, and remainder of my estate) to Antioch University in Yellow Springs, Ohio (for its general purposes) or (for the following purpose: _____)."

While unrestricted gifts allow the University to allocate funds to areas of greatest need, you may designate your bequest for a particular purpose or use by a specific campus, program, or activity at Antioch. In order to ensure that the evolving educational needs of future generations of students are met, it is advisable to include the following language with restricted gifts:

In the event that at some future time due to changed circumstances, in the judgement of the Antioch University Board of Governors, it becomes impractical to apply my bequest to the designated purpose(s), the Antioch University Board of Governors shall make such modifications as will appropriately recognize my interests in coordination with university priorities.

If you wish to document your bequest intention at this time, please complete the form on the back of this sheet.

For more detailed information on including Antioch in your estate plan, please contact:

Laura Andrews

Director of Institutional Advancement

landrews@antioch.edu

40 Avon Street

Keene, NH 03431

603-283-2165

DOCUMENTING YOUR BEQUEST INTENTION

In order to support the educational mission of Antioch University, I have included a non-contingent bequest to Antioch as part of my estate plan. A copy of the relevant provision of my will, codicil, or trust is attached. If I make any changes to this provision, I will notify the University of such change.

Name

Antioch Class and Campus/School Affiliation

Street, City, State, Zip code

Home Telephone

Business/Mobile Telephone

Email

Current Value of Bequest

Date of Birth (for gift counting purposes)

Signature

Date

GIFT DESIGNATION INFORMATION

You can indicate that your gift be used for Antioch University's areas of greatest need or for a specific campus/program/activity that matters to you. Would you like your gift to be used for a specific purpose? YES NO (please circle one)

If you circled yes, please tell us how to direct your gift:

GIFT RECOGNITION INFORMATION

How would you like to be recognized for your gift?

I/We would like to be listed as (a) future Antioch University Planned Giving Society member(s), which may include listing my/our gift within a dollar range. Please list my/our name(s) as: _____ .

I/We prefer that my/our gift not be listed within a dollar range, but you may list my/our name(s) as (a) Planned Giving Society member(s). Please list my/our name(s) as: _____ .

I/We wish to remain anonymous for this gift.

Thank you for sharing this information to ensure that when the time comes, Antioch University understands and can abide by your bequest intentions. Your plans will remain confidential.

Please return this form to Antioch University's Office of Institutional Advancement, 40 Avon Street, Keene, NH 03431. Email it to landrews@antioch.edu.