



Legacy Gift Confirmation

This document provides information about my plan for a legacy gift to benefit Pomona College to ensure that my gift will be received and used as I intend.

I have made provision for Pomona to receive a legacy gift through:

- A will or revocable "living" trust
- A beneficiary designation on a bank account, stock brokerage account, or life insurance policy
- A beneficiary designation on an IRA, 401(k), or other retirement plan
- Other or clarification: _____

(Please attach copies of the pertinent will or trust provisions, or of the beneficiary designation or other documents.)

Pomona will receive this gift:

- Upon my death
- Upon the death of my surviving spouse or partner *(If applicable, spouse or partner to initial here _____ and provide date of birth: _____)*

This gift will be:

- Specific dollar amount: \$ _____
- _____ % of my estate or account(s). My conservative estimate of the value today of my future gift to Pomona is: \$ _____

I would like this gift to support:

- Pomona's greatest need (unrestricted)
- Endowed for *(select one)*: Financial Aid Unrestricted Endowment
- A new or existing fund or other purpose that I will discuss with you. Please contact me.

Pomona's Legacy Society ~ Granite & Sagebrush

- Pomona may include my name on any list or publication recognizing my support and membership in the College's legacy society. No information about the amount of my eventual gift will be publicized.
- Name(s) for recognition purposes: _____
- I prefer to remain anonymous

Signature: _____ Date: _____

Print name: _____ Date of Birth: _____

Phone number: _____ Email address: _____

If the Gift Planning Department has questions, please contact me by Phone or Email.

The information shall be held in confidence until my death, except as I may be recognized as provided above.

This confirmation document is not legally binding on me or my estate.

Questions and Answers about Legacy Gifts that Benefit Pomona College

The generosity and foresight of alumni, faculty, staff, family, and friends who have included Pomona in their estate plans help ensure that the College remains at the forefront of liberal arts education. Thank you for including Pomona in your estate plans!

What is a legacy gift?

A legacy gift is one that Pomona will realize at some future date. It may come from a will or trust, or from any account or plan that allows you to designate a beneficiary to receive all or a part of the remainder, such as a bank account, stock brokerage account, life insurance policy, or an IRA, 401(k), or other retirement plan. Other gifts to be realized in the future may also qualify, and we welcome your questions about them.

Why does Pomona ask for information about legacy gifts?

Many Pomona alumni, faculty, staff, family, and friends will make significant gifts to the College through their estate plans. Pomona wishes to recognize these generous donors during their lifetimes and acknowledge the impact of their future gifts through membership in the College's honorary legacy society, Granite & Sagebrush.

How will my legacy gift be recognized?

For donors who are at least 70 years of age, we will count documented legacy gifts of \$25,000 and above in separately reported fundraising totals alongside annual and other types of gifts. For legacy gifts that will come to Pomona when a surviving spouse or partner dies, both must be at least age 70 to count the gift. For those under age 70, we welcome and appreciate receiving your *Legacy Gift Confirmation* and supporting documents now so that we may welcome you to Granite & Sagebrush at this time and count your legacy gift in future fundraising totals when the qualifying age is met.

What information does Pomona's Gift Planning Office want to know?

To help us understand, facilitate and count your planned legacy gift, we ask that you please:

- (1) complete and sign our *Legacy Gift Confirmation* (see reverse side);
- (2) provide a conservative estimate of the value today of your legacy gift; and
- (3) provide copies of the pertinent will or trust provisions, or the beneficiary designation or other documents.

How do I estimate the amount of a legacy gift for counting purposes?

If you note a specific dollar amount, we will count that amount. If you are leaving a percentage of your residuary estate or assets in a retirement plan, we will count a conservative estimate of the value of your gift. Your estimate is a snapshot in time based on the current value; there is no need to project the value into the future.

Can legacy gifts be designated to a specific program or initiative?

Yes, but unrestricted legacy gifts allow the College maximum flexibility to use your future gift for Pomona's greatest needs, which may not now be known. Or you may designate your legacy gift now to a purpose to be agreed upon by you and the College. Please contact the Gift Planning Office (see below) so we may document your wishes and ensure they can be honored.

What happens if my estate plan changes, or my legacy gift cannot be fulfilled?

We understand that your plans may change in the future. If you make changes that affect your legacy gift, please write to inform us so we can update our records. Your legacy gift confirmation is not legally binding and does not create an obligation on your estate.

Office of Gift Planning, Alexander Hall

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Tax ID: 95-1664112

Thank you! We are grateful for your confidence in Pomona's programs and aspirations.