

**LEGACY SOCIETY ENROLLMENT FORM**  
**Confidential Deferred Pledge Intention**



NAME(S) \_\_\_\_\_

ADDRESS \_\_\_\_\_

In support of Stevens Institute of Technology and its historic mission, I have made the following provision(s)\* in my financial or estate planning:

<b>Type of Provision</b>	<b>Estimated Amount</b> <small>[Approximate Current Value]</small>
<input type="checkbox"/> An outright bequest in my will	\$ _____
<input type="checkbox"/> A contingent bequest in my will	\$ _____
<input type="checkbox"/> A provision in the will of the survivor of my spouse and myself	\$ _____
<input type="checkbox"/> A gift of the assets in my retirement plan after my lifetime	\$ _____
<input type="checkbox"/> A life insurance policy	\$ _____
<input type="checkbox"/> A living trust naming Stevens Institute of Technology as beneficiary <i>(please identify the income beneficiaries or describe other conditions):</i>	\$ _____
_____	
<input type="checkbox"/> A trust under my will naming Stevens Institute of Technology as beneficiary <i>(please identify the income beneficiaries or describe other terms):</i>	\$ _____
_____	
<input type="checkbox"/> Other provision <i>(please specify nature and terms):</i>	\$ _____
_____	
<b>Total: \$ _____</b>	

There is a restriction on my gift provision(s); it is to be used for: \_\_\_\_\_

Please list my name in any public listings of the Legacy Society as: \_\_\_\_\_

In the event that unforeseen circumstances necessitate a change in the provision(s) I have described above, it is my intention to so advise Stevens Institute of Technology.

X \_\_\_\_\_  
Date

X \_\_\_\_\_  
 Brodie Remington  
 Vice President for Development  
Date

*Please return signed form by mail or fax to:*

**Office of Development**  
 Stevens Institute of Technology  
 1 Castle Point on Hudson  
 Hoboken, NJ 07030  
 Fax: (201) 216-8247

Questions? Call Michael Governor  
 at (201) 216-8967  
[Michael.Governor@stevens.edu](mailto:Michael.Governor@stevens.edu)

*\* Any attachments providing details – such as the page from your will that mentions Stevens – would be greatly appreciated.*