



The AMERICAN COLLEGE of the MEDITERRANEAN

Office of Advancement

CONFIDENTIAL STATEMENT OF BEQUEST PROVISION

All contributions, including bequests, are critical to ensuring fulfillment of ACM's mission.

As a demonstration of my support / our support for The American College of the Mediterranean (ACM), I am/we are pleased to have made a bequest provision as indicated below:

- | | |
|--|---|
| <input type="checkbox"/> Will or revocable trust | <input type="checkbox"/> IRA or retirement plan beneficiary designation |
| <input type="checkbox"/> Other type of trust: _____ | <input type="checkbox"/> Life insurance beneficiary designation |
| <input type="checkbox"/> Other beneficiary designation (e.g., bank account, bond, donor advisor fund): _____ | |

Based on the information available to me/us as of the date hereof, the estimated current value of my/our testamentary gift to The American College of the Mediterranean is approximately \$ _____

Donor

Spouse/Partner

SIGNATURE(S)

Donor Name(s) _____

Date _____

Birth Date _____

Country of Citizenship _____

Address _____

City _____ State _____ Zip _____

Phone _____ Email _____

The American College of the Mediterranean understands that this statement of bequest provision is not a legal or binding commitment, and that the amount listed above is an estimate. You have the right to revise this gift at any time if circumstances change. As a courtesy, ACM would appreciate notification in that event. Based on the information provided, your gift will be recognized but the details of this form will remain confidential. As always, please consult your financial, tax, and/or legal advisers to determine the benefits of making a planned gift.

Documenting your bequest allows us to better steward your future gift and personally express our gratitude to you now. It solidifies a lifelong relationship with ACM that will ultimately be made permanent by the legacy you leave.

Documentation Checklist

Under The American College of the Mediterranean's reporting standards, certain documentation is required for my/our bequest to be included in fundraising totals. To that end, attached are the following items:

- ☐ A copy of the portion of the will or trust document or beneficiary designation form referencing my/our planned gift to ACM.
- ☐ The documents signature page.
- ☐ A page indicating the date of the document.
- ☐ If the bequest is included as part of my and my spouse/partner's estate plan and will not be realized until the death of the survivor, attached are copies of my spouse/partner's documents from the above list.

Please return this completed form with any related documentation to us via email or mail:

Email: Kurt Schick, Vice President of U.S. Operations, at kurt.schick@iau.edu

or

Mail: ACM Office of Advancement, 409 Camino del Rio South, Suite 200, San Diego, CA 92108

Phone: (800) 221-2051