

Thelma Albright Legacy Society – Notification of Bequest Intention

Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

Degree(s) & Class Year(s): _____ Birthdate: _____

I / We have named Queens University as a beneficiary in my will or living trust.

_____ Queens' Portion of Estate _____% Current Portion Estimate \$ _____

_____ OR Outright Bequest (specify dollar amount) \$ _____

I / We have named Queens University as a beneficiary of the following planned gift.

Queens' Portion (Below) _____% Current Portion Estimate \$ _____

_____ Retirement Plan (Administrator): _____

_____ Life Insurance Policy (Issuer): _____

_____ Charitable Remainder Trust, Annuity, Other (Institution): _____

_____ Other Assets (Real Estate, Personal Property, for example): _____

Gift Purpose

Please Choose: _____ Unrestricted (Queens' Top Priority) OR _____ Restricted

If restricted, please indicate your preference for the fund, department, or program that may benefit from your gift bequest. Minimum gift levels have been established for restricted gifts.

I / We wish for this gift to be anonymous, so that our names will never be published by the University in connection with bequests or the Thelma Albright Legacy Society.

I retain the right to change my mind as to my designating Queens as a beneficiary, the purpose of my bequest, and/or the portion and amount of my estate intended as a bequest to Queens.

Signature _____ Date _____

Members of the Thelma Albright Legacy Society are ensuring a healthy future for Queens. Thank you for sharing your plans about your bequest by mailing this form and relevant documents to the address below. Questions? Lesley B. Swartz '87, Senior Advancement Officer at 704-337-2595 & swartzl@queens.edu.