



HERITAGE CIRCLE

Membership Recognition

The Heritage Circle is a group of special friends of Alfred University who help ensure the long-term well-being of the University by including Alfred University in their long-term financial or estate planning. The Heritage Circle offers Alfred University the opportunity to express gratitude to members, and by providing special recognition, to encourage others to become members. *We understand that as circumstances change, you may alter your plans to meet your needs and those of your family.*

I / We hereby acknowledge membership in the Heritage Circle of Alfred University, affirming that Alfred University is included in my / our long-term estate or financial plans:

Name(s): _____

Address: _____ Phone: _____

_____ Alfred University may include my / our names, as listed above, on public membership rosters. Or-

_____ Please record my / our membership as "anonymous."

Signature(s): _____ Date: _____

The following information will help us plan for the future:

I / We are pleased to acknowledge that I / we have named Alfred University as a beneficiary of:

- | | |
|--|--|
| <input type="checkbox"/> Will / Living Trust | <input type="checkbox"/> Charitable Remainder Trust |
| <input type="checkbox"/> Retirement Plan | <input type="checkbox"/> Charitable Gift Annuity |
| <input type="checkbox"/> Life Insurance Policy | <input type="checkbox"/> Payable / Transfer on Death Account |
| <input type="checkbox"/> Donor Advised Fund | <input type="checkbox"/> Other _____ |

My / our gift is:

- Unrestricted
 Designated specifically for: _____
 Not yet determined. Please contact me to discuss options.

Optional but helpful information:

The estimated present value of my / our gift is: _____

Copies of relevant documents are attached: Yes / No