

LETTER OF Deferred Commitment

Thank you for your generous commitment to Wartburg College.

The following information will be kept confidential and will only be used for planning purposes by the college. If this pledge includes any portions that are deferred and revocable, Wartburg will count them after receiving a copy of the relevant documentation naming the college as beneficiary, etc.

Name(s) _____ Email _____ Phone _____ ☐ Home ☐ Cell

Address _____ City, State & ZIP _____

About my deferred gift...

Type of donation

- | | | |
|---|--|--|
| <input type="checkbox"/> Will/Bequest | Current estimated value | \$ _____ |
| <input type="checkbox"/> Retirement Plan/IRA | | \$ _____ |
| <input type="checkbox"/> Insurance | | \$ _____ |
| <input type="checkbox"/> Revocable Living Trust | | \$ _____ |
| <input type="checkbox"/> Charitable Lead Trust | | \$ _____ |
| <input type="checkbox"/> Charitable Remainder Trust | | \$ _____ |
| <input type="checkbox"/> Charitable Gift Annuity | | \$ _____ |
| <input type="checkbox"/> Life Estate | <small>gift property while using it during your lifetime</small> | \$ _____ <small>\$25,000 minimum</small> |

How may we use your gift?

- ☐ Wherever the college needs it most (unrestricted)
- ☐ In support of this specific area (restricted):

Are there other named beneficiaries?

- | | |
|------------------------------|-----------------------------|
| <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No |

Online version

Use your phone to scan this code and fill this form out digitally.



Notes about your deferred gift:

About recognizing my gift...

Those who make deferred gifts to Wartburg College become part of our Heritage Society.

How may we recognize your generosity?

- ☐ Please keep my name/our names anonymous in connection with this deferred gift.
- ☐ You may publish my name/our names in connection with this deferred gift as printed below:

- ☐ Please keep the dollar amount of this deferred gift confidential.

My commitment...

Please return this completed form to the address listed below.

Signature 1 _____ Date _____ Birthdate _____

Signature 2, if needed _____ Date _____ Birthdate _____

Scott Leisinger, Vice President for Institutional Advancement _____ Date _____



Development Office
100 Wartburg Blvd., Waverly, IA 50677
319-352-8495 | 866-219-9115
www.wartburg.edu/devoffice

Contributions are tax deductible as allowed by law.

If Your Plans Change

If at any time you change the status of your estate gift to Wartburg College, please notify us so we can update our records. Our goal is to properly steward your estate gift.