CAMBRIDGE IN AMERICA

THE 1209 SOCIETY

Declaration of Intent for Legacy Giving

Please complete this form to notify us of your intended bequest to Cambridge in America, for the benefit of Collegiate Cambridge, and indicate your name preference regarding publication as a ***1209 Society*** member. All information is held in the strictest confidence. Thank you for your gift!

☐ I have named Cambridge in America as a beneficiary in my will/trust:

- for the amount of $ _____
- to receive _____ % of my estate, which I estimate the present value to be $ _____
- to receive the following tangible personal property _____

My bequest is contingent: ☐ Yes ☐ No

☐ I have named Cambridge in America as a beneficiary of my life insurance policy
Current cash value of policy: $ _____ or face value of policy: $ _____

☐ I have named Cambridge in America as a beneficiary of my IRA/retirement plan
I estimate that Cambridge in America will receive $ _____

☐ I have established a Charitable Remainder Trust (CRT) which benefits Cambridge in America
The principal of my CRT when established was $ _____and Cambridge in America will receive _____ % of the remainder when the CRT terminates.

☐ I have established a Charitable Lead Trust (CLT) to benefit Cambridge in America
Cambridge in America will receive $ _____ per year for _____ years under my CLT

I request the Board of Directors of Cambridge in America designate my legacy gift as follows*: _____

_____

_____

1209 Society Name Preference: _____ ☐ I wish to remain anonymous

Signature: _____ **Date:** _____

**Under its charter and in accordance with U.S. tax law, Cambridge in America may not receive restricted gifts. However, the Board gives every consideration to donors' requests when allocating gifts to the University of Cambridge and its constituent Colleges. Cambridge in America's Federal Identification Number is 52-6071299 for tax deductibility under Section 501(c)(3) of the Internal Revenue Code.*

Please return this form, as well as the relevant pages of your will, trust documents, insurance policy or retirement plan information to Caroline Gallaher, Assistant Director of Planned Gifts, at the address below.

This form is for information purposes only. Your estate is not legally bound by submitting this statement. Your intentions may remain revocable and can be modified at any time.

1120 Avenue of the Americas, 17th Floor New York, NY 10036
Tel (212) 984-0962 • Fax (212) 984-0970 • www.cantab.org