

**University of St. Michael's College Heritage Donor Society
& University of Toronto King's College Circle Heritage Society**

Thank you for informing us that you have included the University of St. Michael's College as a beneficiary in your estate plans. Knowledge of your planned gift allows us to recognize your generosity and to ensure that your wishes are fulfilled.

Please take a moment to complete this confidential form to inform the University of St. Michael's College of your planned gift and return it to us at your convenience.

Becoming a planned gift donor makes you a member of the University of St. Michael's College **Heritage Donor Society** and the **University of Toronto King's College Circle Heritage Society**. These memberships honour and provide you with invitations to special events and make certain your future gift intention is appropriately recognized.

If you have any questions or concerns, please email at smc.annualfund@utoronto.ca.

PART A: CONTACT INFORMATION

Full Name(s)

Name of Spouse/Partner (if joint gift):

Date of Birth

Spouse/Partner Date of Birth (if joint gift)

Address

City

Province

Postal Code

Country

Telephone #

Email Address 1

Email Address 2

PART B: ACKNOWLEDGMENT

I/We _____ (name(s)) accept your invitation to become a University of St. Michael's College Heritage Donor Society and a member of the University of Toronto King's College Circle Heritage Society.

Please indicate below how your name(s) should appear in recognition of your deferred gift commitment:

(The University of St. Michael's College and the University of Toronto do not use titles, honorifics or suffixes when listing Heritage Society names.)



UNIVERSITY OF
ST. MICHAEL'S COLLEGE
IN THE UNIVERSITY OF TORONTO

- Please check here if you would like to be recognized for your total donations from the Campaign period, both received (current) and future commitments. *

- Please check here if you do **not** want your name(s) to appear in publications.

Donor lists may be included in printed publications and for other recognition purposes. However, details regarding the nature, amount and future use of any deferred gift are strictly confidential.

Part C: GIFT CONFIRMATION

My/Our will contains a provision for the University of St. Michael's College as:

- Beneficiary in my Will. My Will contains a provision for the University of St. Michael's College in the amount of \$_____ or _____ % of the residue of my estate.

I/We have assigned the University of St. Michael's College as:

- Owner & beneficiary of a life insurance policy.
- Beneficiary of a life insurance policy.
- Beneficiary of a retirement savings plan (RRSP/RRIF) with estimated value of \$_____.

I/We have chosen to direct this gift to:

- St. Michael's Fund** to be used specifically for unrestricted expendable use by the University of St. Michael's College, for the purposes and designs deemed appropriate by the President of the University of St. Michael's College or their designate.

- St. Mike's Future Fund** is an endowment to support the University of St. Michael's College future funding priorities and operations.

- A named endowment fund** designated to the University of St. Michael's College in support of [student bursary, department, centre, or program]. Please specify



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Part D: AUTHORIZATION

Signature:

Signature of Spouse/Partner (if joint gift)

Date:

Date:

** The University of Toronto is offering a new recognition option for donors to the DEFY Gravity Campaign, where planned gifts are also recognized for campaign period giving; we would need the estimated value of your bequest/deferred gift in order to include the amount in your giving recognition. Note: we will not publish the exact value of your donations; rather, you would appear within a giving category, with an asterisk to indicate that your total includes a provision in your estate plan.*

The University of St. Michael's College and the University of Toronto respect your privacy. The information on this form is collected and used for the administration of the University's Office of Alumni Affairs & Development activities undertaken pursuant of the University of Toronto Act, 1971. At all times it will be protected in accordance with the Freedom of Information and Protection of Privacy Act. If you have questions, please refer to www.utoronto.ca/privacy or contact U of T's Freedom Information and Protection of Privacy Office at 416-946-7303, McMurrich Building, Room 104, 12 Queen's Park Crescent West, Toronto, Ontario M5S 1A8.

Thank you for your support of the University of St. Michael's College.