

Care to Share?

According to a recent survey conducted by the National Committee on Planned Giving, for every bequest known to a charity there are two additional bequests benefiting that charity that are not known. In other words, two out of three people naming Rose-Hulman in their wills have not advised the school of their generosity.

The Office of Planned Giving would like to make an effort to identify (and recognize if they so desire) donors who have included Rose-Hulman in their estate plans. So, if you have included Rose in your will, revocable living trust, and/or life insurance, we ask that you answer a few questions and return your answers in the enclosed envelope. All answers will be kept in the strictest confidence.

1. Have you included Rose-Hulman in your estate plans?

yes no

2. If so, please identify the type of plan:

last will and testament revocable living trust
 charitable remainder trust life insurance
 other (describe: _____)

3. My gift to Rose-Hulman is: (please check all that apply)

a percentage of my estate (_____%; value: \$_____)
 a stated dollar amount (value: \$_____)
 a gift-in-kind (value: \$_____)
 unrestricted
 restricted (purpose _____)

4. May we recognize you for this deferred gift?

yes no

Name (as you would like to have it appear in the Honor Roll of Donors):

5. I have enclosed a photocopy of my will or trust, or at least that portion mentioning Rose-Hulman.

yes no

6. Please send me a complimentary copy of *Planning Your Will for All It's Worth*.

7. Would you be interested in attending an estate planning seminar in your area?

yes no

If yes, what time below would be convenient for you?

Saturday morning Weekday evenings

Thank you for sharing this information with Rose-Hulman.

Name _____

Please print

Address _____

City _____ State _____ ZIP _____

Phone _____ The best time to call me is _____ a.m. / p.m.