



THE COVENANT SOCIETY

Statement of Intent

Name: _____ Date: _____

Home address: _____

Preferred phone: _____

Email: _____

Executor, attorney and/or next of kin: _____ Phone: _____

Double the Impact of Your Legacy with the University Match for Documented Planned Gifts

As part of the We Believe Campaign, Belmont University will match, dollar for dollar, newly documented bequest intentions to establish new or contribute to existing endowments for scholarships, faculty support and missions during the We Believe Campaign. The minimum contribution required to receive the match is \$25,000 and is capped at \$1.5 million per gift. To secure the match for planned gifts, send a signed statement of intent with required fields (*) to Belmont's Office of Development by May 31, 2021. For more information, please call the Office of Development at 615.460.5517.

I would like to become a member of the Covenant Society and have made the following provision(s) for Belmont University in my estate plans:

Outright bequest in my will:

The dollar amount is \$ _____ *

Residuary bequest:

Percentage of Belmont's portion of the residue of my estate _____ %

Current value of Belmont's portion \$ _____ *

IRA or other retirement program:

Type of retirement program _____

Value of Belmont's portion \$ _____ *

Life insurance policy:

Type of policy _____

Policy face value \$ _____ *

Current cash value \$ _____

please see →
reverse side

Gift of property:

Description of property (real estate, etc.): _____

Purpose of gift(s) to Belmont University:

- Restricted for an existing endowment: _____
- Restricted for a new endowment: _____
- I/We have documented our estate plans with Belmont through a testamentary agreement.

Additional information: _____

Signature of donor: _____ Date: _____

- I/We wish to remain anonymous.

The Covenant Society recognizes all donors who have made provisions for Belmont through their estate plans. This is a confidential form and is not legally binding on you or your estate. However, the information shared here will help Belmont in its long-range planning efforts. On behalf of all those students who will benefit, thank you for supporting the work of the University, and welcome to membership in the Covenant Society.



Please return this form to:
Belmont University
Office of Development
1900 Belmont Blvd.
Nashville, TN 37212

Questions may be directed to:
Office of Development
615.460.5517
development@belmont.edu