



FAIRFIELD THE UNIVERSITY

# BELLARMINESOCIETY

## Enrollment Form

The Bellarmine Society celebrates Alumni, Parents, and Friends who have included Fairfield University in their estate plans or made other types of planned gifts. Our Bellarmine Society members are among our most valued supporters, and leaving a legacy at Fairfield reflects their belief in an education grounded in Catholic and Jesuit values. These gifts will benefit generations of future Fairfield University students. Please complete this enrollment form to formally join the Bellarmine Society.

**Fairfield University has been named in the following way(s):**

- Gift through a will or living trust
- Retirement account beneficiary
- Life insurance beneficiary
- Charitable Gift Annuity
- Charitable Remainder Trust
- Other (please specify): \_\_\_\_\_

For gifts through estate plans or beneficiary designations:

**The fixed amount is \$ \_\_\_\_\_.**

**The percentage is \_\_\_\_\_% with an estimated current value of \$ \_\_\_\_\_.**

*Fairfield University recognizes that this amount is an estimate based on my gift's current value and the amount will change over time.*

If there is a contingent beneficiary, please provide their name and date of birth:

\_\_\_\_\_

**Supporting documentation provided**  Yes  No

**My gift shall be used for:**

- The general benefit of the University, wherever the need is greatest; or
- The specific purpose of \_\_\_\_\_

**Donor Name:** \_\_\_\_\_ **Class Year:** \_\_\_\_\_ **Birth Date:** \_\_\_\_\_

**Donor Name (if joint gift):** \_\_\_\_\_ **Class Year:** \_\_\_\_\_ **Birth Date:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Telephone:** \_\_\_\_\_ **E-mail:** \_\_\_\_\_

My/our name(s) should be written on our Bellarmine Society certificate as:

\_\_\_\_\_

I/we wish to be listed in any published list of Bellarmine Society members as "Anonymous"

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_ **Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

*I understand, and Fairfield acknowledges, that this form is in no way legally binding on me or my estate and that my gift is fully revocable and may be modified at any time. I will inform Fairfield University if my plans alter in the future. In the event the terms or preferences for my gift become impossible or impractical to fulfill, the Board of Trustees of Fairfield University will apply my gift to a purpose that best approximates my intentions.*

