

# Documenting Your Intentions

## Complete Your Planned Gift Today!

Thank you for including Saint Michael's College in your estate plans. Documenting your planned gift will assure the impact you intend.

## 3 REASONS TO DOCUMENT YOUR INTENTIONS WITH SMC

### 1. Your wishes will come true.

Documenting your intentions will help ensure your wishes are met. If you are designating a specific purpose for your gift or establishing an endowed fund, we can review documentation with you or provide specific language. If you do not yet have a designation, simply complete the Heritage Circle Intent Form to document your wishes. We will confidentially keep copies of your documents in our records for future reference.

### 2. You make a difference for Saint Michael's.

When you document your intentions with Saint Michael's, the estimated value of your future gift counts toward current fundraising goals and inspires other alumni, parents and friends to follow in your footsteps. For alumni, if you document your planned gift during a reunion year, the estimated value will count towards your class reunion fundraising goals.

### 3. You can always make a change.

By documenting your intentions, you are in no way entering into a legally binding or irrevocable gift agreement (unless you enter into a binding agreement for specific reasons). You retain the flexibility to change your plans, should your circumstances or priorities change. As a courtesy, we kindly ask that you notify us should you update your plans for Saint Michael's.

## Have a bequest?

Here's all you will need to document it:

- Completed Heritage Circle Intent Form (if applicable)

### AND a copy of one of the following:

- The portion of your will or trust document referencing Saint Michael's College

or

- The beneficiary designation form from your insurance policy or retirement account

Saint Michael's College  
Office of Planned Giving

Carla Francis  
Development and Gift  
Planning Officer Phone:  
802-654-2618 Email:  
cfrancis@smcvt.edu



**SAINT MICHAEL'S**  
**COLLEGE** FOUNDED  
1904