



Carpe Diem Society

I have made provisions for a gift to the Montclair State University Foundation and Montclair State University in my estate plan based on the following information (please check all that apply):

The contact information for my estate planning attorney, executor and or trustee is:

Name _____ Phone _____

Email: _____ Address _____

☐ Will (Estimated Current Value) (a) \$ _____

☐ Beneficiary of a Life Insurance Policy (Estimated Current Value) \$ _____

☐ Beneficiary of an Interest in a Trust:

- Total Trust Value (Estimated Current Value) \$ _____

- Amount Allocated for the Benefit of Montclair State University Foundation and/or Montclair State University:

- Revocable Beneficiary \$ _____

- Irrevocable Beneficiary \$ _____

☐ Gift Annuity (Estimated Current Value) \$ _____

☐ Beneficiary of IRA or (Estimated Current Value) \$ _____

☐ Beneficiary of Bank, Brokerage or other Financial Account \$ _____

(Estimated Current Value)

☐ Other Retirement Account (Estimated Current Value) \$ _____

☐ Donor Advised Fund Beneficiary (Estimated Current Value)

Please designate your gift (scholarships, college, or other) and define the purpose of the gift _____.

☐ By notifying Montclair State University Foundation of this intended gift, I understand that I am eligible to join the Carpe Diem Legacy Society, the special recognition society for the many alumnae and friends of the University who have included Montclair State in their estate plan or have made other planned gifts. I wish to become a member of the Carpe Diem Legacy Society and would like to be recognized as:

☐ I wish to become an anonymous member of the Carpe Diem Legacy Society and request that my name not be listed publicly.

Your name: _____ Date: _____

Address: _____

Email: _____ Class Year _____ (if applicable) Date of Birth _____

Phone: _____

This form is not a legally binding document and does not constitute a legal promise for any future donation to Montclair State University. We understand bequests are revocable and that your estate plans may change. If there are any future changes to your plans, please let us know.

For any questions, please contact: Ely F. Santoni, at 973-655-3695 or via email at santonituere@montclair.edu.

Montclair State University, 1 Normal Avenue, Montclair, NJ 07043