



## THE COVENANT SOCIETY *Donor Intent Form*

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Home address: \_\_\_\_\_

Preferred phone: \_\_\_\_\_

Email: \_\_\_\_\_

Executor, attorney and/or next of kin: \_\_\_\_\_ Phone: \_\_\_\_\_

*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.*

*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 residual 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: \_\_\_\_\_
- Unrestricted for the university or a particular college: \_\_\_\_\_
- Other, please specify: \_\_\_\_\_
- 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.



*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