



WILLIAM ALANSON WHITE
I · N · S · T · I · T · U · T · E

of Psychiatry, Psychoanalysis & Psychology

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CHARLES C. HARRINGTON
LEGACY SOCIETY
PLANNED GIFT FORM

Thank you for helping to ensure a solid future for our Institute through your planned legacy gift. Kindly provide the requested information to assist us in making certain your intent is realized. The Director and Director of Administration are available to help you learn about the different options and answer any questions you may have in completing this form. The Institute is a qualified tax-exempt organization. The tax ID for the William Alanson White Institute is 13-1624217.

I plan on making (check one or more):

Gift in your will The name and contact information for your attorney, executor, or trustee:

Beneficiary of an IRA, 401K or other retirement plan The institution(s)/bank(s) where the investments are held; the account number(s) from which the gift to the Institute will be made:

Beneficiary of a life insurance policy The name of the company and the number of the policy:

Other planned gift Please specify:

You may specify your gift to the General Endowment Fund, which provides the Institute leadership with the most flexibility to put your gift to good use in meeting the needs and goals of the programs of the Institute. Alternatively, your gift may go to a restricted fund or be used for operating expenses.

The following is an overview of the General Endowment Fund and special purpose funds:

- **General Endowment Fund** – The use of this fund is determined by Institute leadership in order to best meet the short- and long-term needs and goals of the Institute.
- **Restricted funds** – For example, scholarships or loans for students or specific programs of the Institute. If the purpose of a restricted fund was no longer a part of the Institute's mission, the Board of Trustees could vote to disband the fund and transfer its funds to the General Endowment.
- **Operating expenses** - Apply the funds to the current expenses of the Institute.

How can we make a legacy donation to these funds?

The donation can be made as a part of your estate documents or by completing this donor instruction form. The form will be kept on file with the Institute. If your desires change, the most recent instruction document would be honored.

We/I have made arrangements for a legacy gift to the William Alanson White Institute and designate the gift on the following proportionate basis:

General Endowment Fund _____%

Restricted fund, specified as follows:

_____ %

Current operating expense _____%

We would like to use your name(s) as members(s) of the Institute's Legacy Society.

If you wish to remain anonymous please let us know by checking this box

Acknowledged and agreed by:

Your name(s) - *please print:*

Signature(s):

Date:

Please deliver this form in a sealed envelope to the Institute, to the attention of LEGACY. Contact the Director if there are any changes in your gifts or plans. Except for your name if you are permitting it, your specific commitment information will be held in strict confidence until the gift is made.

Thank you for all you do for the Institute.