



Missouri Western State University Foundation
Clock Tower Society

Enrollment Form

The heritage of Missouri Western State University traces back to its founding as St. Joseph Junior College in 1915. Citizens of St. Joseph were dedicated in their efforts to establish a Junior College and to see it mature into a baccalaureate institution.

The Board of Directors of the Missouri Western State University Foundation has established the Clock Tower Society to honor those persons who have included the Foundation as a beneficiary of their estate and have formally confirmed the same to the Foundation. As an expression of the Board's appreciation, such persons will be listed as honorary members of the Clock Tower Society.

You have notified a representative of the Foundation that you have planned an estate gift for the benefit of Missouri Western State University. In order that the Foundation's records are complete and current, we ask that you complete this form and return it to the Missouri Western State University Foundation.

Yes, It is my/our intent to support the higher education and community service missions of Missouri Western State University. I/we have included a gift for the benefit of Missouri Western State University in my/our estate plan. All legal documents required to activate this planned gift have been signed and properly executed. The information provided below describes my/our gift. It is understood that, unless I/we notify the Foundation that I/we do not wish to be listed, I/we will be included on the roster of Clock Tower Society members that will be published in publications and public reports.

Signature #1 _____ Signature #2 _____ Date _____

Please print

Donor #1 _____ Donor #2 _____

Name(s) as it is to be shown on the roster _____ I wish to be listed as Anonymous

Address _____ City, State, Zip _____

E-mail address _____

Telephone Number _____ Home Fax Number _____

Date of Birth (donor #1) _____ Date of Birth (donor #2) _____

Children of the donors [please provide name(s) and date(s) of birth] _____

OVER

Type of Gift

I/We have provided a gift for the benefit of Western via the following instrument(s).

(Please check all that apply)

- Bequest in a Will or Revocable Trust
- Charitable Remainder Trust
- Life Insurance Benefit
- Retirement Plan Benefit
- Retained Life Estate
- Other _____

My/our gift is estimated to be \$ _____

The proceeds of my/our estate gift, when received by the MWSU Foundation, are to be used as follows. (Please check one)

- Unrestricted – use as most needed
- Restricted – for a specified purpose (describe) _____

My/our affiliation with Western is as follows (please check all that apply)

- Interested friend of Western
- Western/St. Joseph JC alum
- Current or former Western employee
- Parent of student or alum
- Other _____

The beneficiary of my/our estate is listed as: (please check one)

- Missouri Western State University Foundation, Inc.
- Missouri Western State University
- Other (describe) _____

The Missouri Western State University Foundation, Inc. was founded in 1969 to receive, hold and administer contributions for the benefit of Missouri Western State University and its students. It is a separate IRS approved 501(c)(3) charitable organization, which means that contributions qualify for the charitable deduction on your Federal Income Tax Return. It is recommended that bequests/gifts to benefit Missouri Western State University be made payable to the Missouri Western State University Foundation, Inc.

Optional Data

You are encouraged to provide this data because it will be helpful. However, it is optional data and should be provided only if you are comfortable in doing so.

Contact Person (After your bequest has been received by the Missouri Western State University Foundation, who should we contact if there is a question regarding your bequest/gift?)

Advisors (please list your advisors)

Executor/Personal Representative of your estate. _____

Attorney _____

Accountant _____

Life Insurance Agent _____

Other _____

Charitable Beneficiaries

Are there other charitable beneficiaries of your estate/financial plan?

- Yes No

If yes, please list them

The information you have provided will be treated as confidential. Thank you for your generosity in including Western in your estate plan. Thank you too for providing this data.

Missouri Western State University Foundation
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