



Dear Donor,

We realize that many people who plan to support the Whitehead Institute for Biomedical Research through their estate and/or financial plans prefer to keep their intentions private. However, by letting us know of your plans, we can thank you during your life, and confirm that we are able to fulfill your stated intentions.

Please know that completing this form is non-binding — we understand that you may change your plans at any time. Please also know that all information you share with us is kept strictly confidential.

Mary Sullivan
Manager of Advancement Operations and Donor Relations
Whitehead Institute for Biomedical Research
Phone: (617) 258-5103
Email: marysull@wi.mit.edu

Planned Gift Notification – Confidential

Personal Information

Name: _____

Spouse Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

Date(s) of Birth: _____

Your Gift Intention

Please provide the following information and attach a copy of the documentation or appropriate language from your will or trust, if available. Please complete all that apply.

- ☐ I/We want to support the mission of the Whitehead Institute for Biomedical Research through a planned gift as described below:
- ☐ I/We have included a bequest for the Whitehead Institute in my/our will or living trust.
- ☐ I/We have named the Whitehead Institute as a beneficiary of an asset:
- ☐ Retirement Plan ☐ Bank, Investment, or Other Financial Account
- ☐ Life Insurance Policy ☐ Other: _____
- ☐ I/We have named the Whitehead Institute as a revocable/irrevocable (*circle one*) beneficiary of a charitable remainder trust.

The anticipated value of my/our gift is/will be approximately \$ _____ or _____ % of my/our estate. (*If possible, please include a copy of the bequest language or other wording describing your planned gift.*)

Signature(s):

Date: _____

Return form to:

Mary Sullivan
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Whitehead Institute for Biomedical Research
455 Main St Cambridge, MA 02142
Phone: (617) 258-5103
Email: marysull@wi.mit.edu