

U.S. NAVAL ACADEMY FOUNDATION

ROBERT MEANS THOMPSON SOCIETY MEMBERSHIP FORM

The Robert Means Thompson Society, named for one of the Academy's first and most significant philanthropists, honors alumni and friends who have included the Naval Academy Foundation in their estate plans.

Name of Donor 1: _____ DOB: _____
Name of Donor 2: _____ DOB: _____
Address: _____ City: _____ State: _____ Zip: _____
Phone (daytime): _____ Email: _____

- I/we have planned a gift to benefit the future of the United States Naval Academy Foundation and would like to have my/our gift counted during our lifetimes (complete sections below).
- I/we have a planned a gift but prefer to keep the details private.

ESTATE COMMITMENT FORM

If you (and your spouse, if your estate gift will come after both of your lives) will be 65 or older by June 30, 2030, you can have your estate gift counted during your lifetime. Documenting your estate gift allows us to recognize your generosity during your lifetime, and it can count toward your class giving totals. This is not a legally binding document.

TYPE OF GIFT AND PROVISION

Type:

- Will or Living Trust
 Retirement Assets (IRA, 401k, 403b etc.)
 Charitable Remainder Trust
 Life Insurance
 Recommended payment from my donor advised fund
 Other _____

This provision is stated as:

- A specific dollar amount: \$ _____
 A percentage: ____% and I estimate the current value of this % to be \$ _____

USNAF will receive this:

- Upon my death
 Upon the death of my surviving spouse/partner

SUPPORTING DOCUMENTS

Attached is one of the following:

- A copy of the relevant page(s) of the will or trust provision pertaining to the U.S. Naval Academy Foundation and a copy of the cover and signature pages of the document
 A copy of the beneficiary designation form. I estimate the current value of this % to be \$ _____
 Letter from my attorney, executor or trustee
 Other _____

If the provision is stated as a percentage of your estate or an account, please also attach a recent statement of the account or your written best estimate of the value of your gift.

GIFT DESIGNATION

- Unrestricted Restricted for: The Long Blue Line—*supports the mission of the U.S. Naval Academy Alumni Association and Foundation in perpetuity*
 Athletic Excellence Legacy Fund—*supports U.S. Naval Academy athletics in perpetuity*
 Class of _____ Project
 Other _____

FUTURE CONTACT INFORMATION

To help facilitate your gift in the future, please share information about your executor, or another contact person:

Executor Name _____ Phone _____ Email _____

Please send this form with a copy of the supporting documents to:
Office of Planned Giving, U.S. Naval Academy Foundation, 274 Wood Road, Annapolis, MD 21402.



How do I join the Robert Means Thompson Society?

If you have provided for the future of the U.S. Naval Academy Foundation with a gift in your will, trust, IRA account, 401(k), 403(b), or life insurance policy or with a life income gift, you are invited to become a member of the Robert Mean Thompson Society by completing the top section of the form on the back of this document.

What is an "estate commitment?"

An "estate commitment" is a gift that USNAF will realize at some future date. It may come from a will, trust, retirement plan, donor advised fund, life insurance policy or commercial annuity where you have designated USNAF to receive the remainder. Other gifts to be realized in the future may also qualify, and we welcome your questions about them.

Why does USNAF count estate commitments?

Many USNAF alumni and friends make significant gifts in the form of estate gifts. USNAF wishes to recognize these generous donors during their lifetimes and acknowledge the impact of their gifts.

How will my estate commitment be counted?

If you will be 70 by June 30, 2030, your estate commitment will be counted at its full estimated current value. Estate commitments of donors who will be between 65 and 70 by June 30, 2030, will be counted at 80 percent of their estimated current value. To have your estate commitment counted during your lifetime, complete and sign the estate commitment form on the reverse side and provide documentation of your plans.

My estate gift to USNAF will only become effective if my spouse/partner predeceases me. Can my gift still count in the campaign?

Yes, if your spouse or partner also includes a provision for USNAF in his or her estate plan and will be over age 65 by June 30, 2030. Your spouse should join you in signing the estate commitment form.

What about friends or other family members?

Our standard policy is that we cannot count estate commitments contingent upon any family member or individual other than your spouse/partner predeceasing you. You are welcome to call the Office of Planned Giving to discuss your situation.

How do I determine the amount of my estate commitment?

If you plan a gift of a specific dollar amount to the Foundation, that amount will represent your estate commitment. If you are leaving a percentage of your residuary estate or assets in a retirement plan, USNAF will accept your good faith estimate of what you believe your gift is worth today.

May I designate my estate commitment to a specific program or initiative at the Naval Academy?

Unrestricted estate commitments allow the Academy to use your gift where the need is greatest. However, you may designate your estate commitment to a favorite program or campaign initiative such as The Long Blue Line. You may also add it to an existing fund. If you choose to restrict your estate commitment to a fund not listed on this form, please contact the Office of Planned Giving (see contact information below), which will help ensure that your wishes are honored.

What happens if my estate cannot fulfill my estate commitment?

Your estate commitment is not legally binding. If your estate cannot fulfill your commitment, we will accept whatever remaining funds, if any, are earmarked for USNAF.

What happens if the gift from my estate becomes greater than my estimate?

USNAF will accept the greater amount with gratitude.

What happens if I change my estate plan?

We understand that your plans may change in the future. If you make changes that affect your estate commitment, please inform us in writing so that we can update your records.

The Office of Planned Giving welcomes the opportunity to answer questions about an estate commitment you may be considering.