

## Advisor's Guide for Planned Giving

### **Gifts from Wills and Trusts:**

When making a charitable gift to a nonprofit organization, it is vital the legal name of the charity, city, state and other identifying information be provided. To name Wesleyan University in your will or trust please use the following suggested language:

### **Unrestricted bequest –**

*"I give (a specific dollar amount/a specific asset, or percentage of the rest, residue, and remainder of my estate) to Wesleyan University, the charitable, tax-exempt organization located in Middletown, Connecticut, for its general purposes."*

### **Bequest for a specific purpose –**

*"I give (a specific dollar amount/a specific asset, or percentage of the rest, residue, and remainder of my estate) to Wesleyan University, the charitable, tax-exempt organization located in Middletown, Connecticut, to be used for the following purpose: (state the purpose)."*

NOTE: If you wish to restrict your bequest to a specific purpose or program at Wesleyan, please contact the Office of Gift Planning in advance to assure that the language you include will accomplish your wishes and align with the University's needs.

### **Endowment funds for a restricted purpose –**

If your bequest will be used to establish an endowment fund for a restricted purpose, we recommend that you and your counsel consider adding a "saving clause" to your bequest provision. A "saving clause" is a way to ensure the usefulness and relevance of your bequest in the future as the University's needs and priorities change. For example: *"If, in the future, it is the opinion of the Board of Trustees at Wesleyan University that all or part of the income of this fund cannot be usefully applied to such purpose, it may be used for any related purpose which, in the sole opinion of the Board of Trustees, will most nearly accomplish my wishes."*

### **BENEFICIARY GIFTS FROM RETIREMENT PLANS, LIFE INSURANCE, BROKERAGE ACCOUNTS OR ANY OTHER PLAN WITH A BENEFICIARY DESIGNATION:**

Please contact your plan provider for a change of beneficiary form.

Once you have filled out the form, please send a copy to:

Wesleyan University  
Office of Advancement Gift Planning  
291 Main Street  
Middletown, CT 06459

**Legal Name: Wesleyan University**

**Tax I.D. Number: 06-0646959**

**Incorporated In: Middletown, CT**

### **Note to Attorneys, Accountants and other professional Advisors:**

If you have any questions or would like additional information about planned gifts to benefit Wesleyan, please do not hesitate to contact Marianne Calnen at [mcalnen@wesleyan.edu](mailto:mcalnen@wesleyan.edu) or Mark Davis '96 at [mdavis@wesleyan.edu](mailto:mdavis@wesleyan.edu) or call (860) 685-5775. Thank you.