A gift to University of Puget Sound in your will or trust gives you maximum flexibility

- **Flexible** – Assets remain in your control during your lifetime should you need them. Also, you can make your gift conditional on another event, such as if your spouse does not survive you.
- **Easy to arrange** – If you don’t already have a will, you should consult legal counsel to prepare a will for you. If you already have a will, a simple amendment (called a codicil) can be used to add a gift to University of Puget Sound.
- **Revocable** – A gift designation can be changed in the future.
- **Possible tax savings** – If your estate is subject to federal estate taxes your gift to University of Puget Sound will qualify for an estate tax charitable deduction.

Select the type of gift for your will or trust that works best with your estate plan

There are various types of estate gifts. Determine which works best for you.

- **General** – for a certain dollar amount - “the sum of $25,000”
- **Specific** – a particular asset – “1,000 shares of XYZ stock,” or “my real estate located at 1234 Main Street”
- **Residual** – a gift of the remainder of your estate, after all other distributions and administration expenses have been paid – “fifty percent of the rest of my estate”
- **Contingent bequest** – under certain conditions – “in the event my spouse does not survive me”
- **Unrestricted bequest** – where the need is greatest at [charity_name]
- **Restricted bequest** – for a specific program or initiative (please contact us to ensure your gift will have the desired impact)
Suggested wording for your advisor

Please share this suggested wording with your legal advisor.

I give to University of Puget Sound, a Washington non-profit (Tax ID #91-0564961), or its successor, the sum of $___________________, for any purpose as University of Puget Sound deems appropriate.

I give to University of Puget Sound, a Washington non-profit (Tax ID #91-0564961), or its successor (the real estate located at ________________ or 1000 shares of XYZ stock), for any purpose as University of Puget Sound deems appropriate.

I give to University of Puget Sound, a Washington non-profit (Tax ID #91-0564961), or its successor, _______% of the rest of my estate, for any purpose as University of Puget Sound deems appropriate.

Next steps

■ If you already have a will or trust, review the documents to determine if any changes in your family or other circumstances warrant revising the document.

■ If you wish to add University of Puget Sound for a gift in your existing will or trust, contact the attorney who drafted the document and request a simple amendment

■ If you don’t have a will or trust, contact a competent attorney to have these documents prepared. If you don’t know who to contact, seek a recommendation for an estate planning attorney from family members, friends, or colleagues at work. You may also contact your local bar association lawyer reference service for a referral.

We are here to assist
If you have questions please contact us:

- Office of Capital and Planned Giving
- 253-879-2922
- plannedgiving@pugetsound.edu
BEQUEST LANGUAGE

The following is intended to help you draft a bequest that meets your intentions regarding University of Puget Sound. If you wish to support a particular program, we ask that you contact our office. Our legal name should appear as:

**Legal name:** University of Puget Sound, Federal Tax ID number: 91-0564961

**We suggest the following wording:**

**General Bequest of a stated sum of money:**

“I give to University of Puget Sound, 1500 N Warner Street, Tacoma, WA 98416, Federal Tax Identification Number 91-0564961 _______________Dollars ($__________).”

**Specific Bequest of a certain asset from your estate:**

“I give to University of Puget Sound, 1500 N Warner Street, Tacoma, WA 98416, Federal Tax Identification Number 91-0564961, [insert here a description of the particular property].”

**Residuary Bequest, after other bequests and expenses have been paid:**

“I give to University of Puget Sound, 1500 N Warner Street, Tacoma, WA 98416, Federal Tax Identification Number 91-0564961, [all] [a portion] of the rest of my estate.”

**Contingent Bequest if you are not survived by certain individuals:**

“If [name/s of primary beneficiary/ies] do/es not survive me, or shall die within ninety (90) days from the date of my death, or as a result of a common disaster, then I give to University of Puget Sound, 1500 N Warner Street, Tacoma, WA 98416, Federal Tax Identification Number 91-0564961, [insert here the exact dollar amount, description of property, or percentage of residual estate].”

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