

# MOUNT HOLYOKE

## SAMPLE LANGUAGE

### FOR INCLUDING MOUNT HOLYOKE COLLEGE IN YOUR WILL

Mount Holyoke College  
50 College Street  
South Hadley, MA 01075

**Mount Holyoke's Tax ID #: 04-2103578**

A bequest, or legacy gift, to Mount Holyoke as part of your estate plan provides meaningful support for the College. Since Mount Holyoke's founding in 1837, thousands of Mount Holyoke alumnae, faculty, and friends have made bequests to the College. Bequests connect to the enduring legacy of the College's mission to educate women at the highest level of academic excellence.

The particular wording for a bequest clause is determined by the type of designation you wish to make. The suggested wording below is for common types of bequest arrangements and reflects Mount Holyoke's highest priorities. The College encourages you to review the wording with your attorney. Should you wish to explore other designations, please contact the Office of Gift Planning at 800-642-4483.

#### **Unrestricted Bequest - Allows the College the Most Flexibility**

"I give to THE TRUSTEES OF MOUNT HOLYOKE COLLEGE<sup>1</sup> in South Hadley, Massachusetts, (\_\_\_% of my residuary estate) or (all of my residuary estate) or (the sum of \$ \_\_\_\_\_) to be used for the benefit of Mount Holyoke College as the Trustees thereof may direct."

#### **Restricted Bequest**

"I give to THE TRUSTEES OF MOUNT HOLYOKE COLLEGE in South Hadley, Massachusetts, (\_\_\_% of my residuary estate) or (all of my residuary estate) or (the sum of \$ \_\_\_\_\_) to be used for the benefit of Mount Holyoke College, to be used with preference for (insert here how you wish the gift to be used — for example: financial aid, faculty salaries, or a \* specific interest).

#### **Bequest to the College Endowment - Use of Income Unrestricted**

"I give to THE TRUSTEES OF MOUNT HOLYOKE COLLEGE in South Hadley, Massachusetts, , (\_\_\_% of my residuary estate) or (all of my residuary estate) or (the sum of \$ \_\_\_\_\_) to be added to the endowment of the College and invested under the direction of the Trustees, the income only to be used for the College's general purposes."

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<sup>1</sup> The corporate name of the College

\* To insure that the College can fulfill your wishes, please consult with the Office of Gift Planning when designating your gift to a specific purpose

### **Bequest to specific College Endowment - Use of Income Restricted**

"I give to THE TRUSTEES OF MOUNT HOLYOKE COLLEGE in South Hadley, Massachusetts, (\_\_\_% of my residuary estate) or (all of my residuary estate) or (the sum of \$\_\_\_\_\_ ) to be added to the endowment of the College and invested under the direction of the Trustees, with preference that the income only be used . . ."

(Financial Aid) ". . . to provide financial aid for students attending Mount Holyoke College. The conditions of awarding such aid shall be determined by the Trustees of the College."

(Faculty Compensation) ". . . for support of faculty compensation at Mount Holyoke College."

(\* Specific Academic Discipline) ". . . for support of the study of \_\_\_\_\_ (e.g. English, Economics, Mathematics, etc.) at Mount Holyoke College."

### **Bequest for a Named Endowed Fund - Use of Income Restricted – \$100,000 minimum**

"I give to THE TRUSTEES OF MOUNT HOLYOKE COLLEGE in South Hadley, Massachusetts, (\_\_\_% of my residuary estate) or (all of my residuary estate) or (the sum of \$\_\_\_\_\_ ) for an endowed fund to be known as the "[Insert Name of Fund]", the income only to be used with preference (insert here how you wish the gift to be used — for example: financial aid, faculty salaries, or a \* specific interest). Should the gift fall short of the amount required to establish an endowment, the funds shall be used in entirety for the same purpose as stated.

### **Contingent Bequest for Mount Holyoke**

When naming Mount Holyoke as a contingent beneficiary, it is possible to make testamentary gifts to one or more individuals with the assurance that if any of the named individuals predecease you, the bequest will come to Mount Holyoke College.

"If any of the above-named beneficiaries should predecease me, I devise and bequeath to THE TRUSTEES OF MOUNT HOLYOKE COLLEGE in South Hadley, Massachusetts, all the property, real or personal, that said beneficiary or beneficiaries would have received had they survived me."

### **Codicil to Existing Will**

You can also make a gift to Mount Holyoke College by having your attorney draw a Codicil to your existing will using the legal language as given above.

### **Bequest to Establish Life Income Gifts to Benefit an Heir**

You can make a testamentary transfer of assets to a charitable trust which will provide lifetime income to your heirs for their lifetime or a term of years – then leave a gift to Mount Holyoke. Your estate can receive a tax deduction. If you are interested in this estate planning option, please contact the Office of Gift Planning.

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