



# YALE UNIVERSITY BEQUEST INTENTION

## INCLUDING YALE IN YOUR ESTATE PLAN

Bequests and other testamentary gifts by generous alumni and friends have been a significant source of financial support for the University for over 300 years. The continuation and expansion of this tradition of remembrance will contribute to Yale's future financial strength and continued academic excellence.

A gift to the University through your estate plan qualifies you as a member of Yale Legacy Partners, created to recognize and thank donors whose foresight is building the future of Yale.

You can make a specific gift to Yale of cash, securities, real estate or other property through your will, codicil or trust instrument. You can also designate Yale as the beneficiary of all or part of the remainder of your estate or trust after the payment of estate-related expenses, other bequests, or following the death of a spouse or other primary beneficiaries. Another way to include Yale in your estate plan is to name the University as a beneficiary of your retirement plan or life insurance policy.

A bequest or trust provision for the benefit of Yale may qualify your estate for an estate tax charitable deduction.

## SAMPLE TESTAMENTARY LANGUAGE

*"I give ( \_\_\_\_\_ dollars) or (a specific asset, such as securities, real estate or other property) or (all) or ( \_\_\_\_\_ percent of the rest, residue, and remainder of my estate) to Yale University in New Haven, Connecticut (for its general purposes) or (for the following purpose: \_\_\_\_\_)."*

While unrestricted gifts allow the University to allocate funds to areas of greatest need, you may designate your bequest for a particular purpose or use by a specific school, program or activity at Yale. In order to ensure that the evolving educational needs of future generations of students are met, it is advisable to include the following language with restricted gifts:

*In the event that at some future time due to changed circumstances, in the judgment of the Yale Corporation, it becomes impractical to apply my bequest to the designated purpose(s), the Yale Corporation shall make such modifications as will appropriately recognize my interests in coordination with University priorities.*

**If you wish to document your bequest intention at this time, please complete the form on the back of this sheet.**

For more detailed information on including Yale in your estate plan, please contact:

Yale University  
The Office of Planned Giving  
PO Box 2038  
New Haven, Connecticut 06521-2038

Phone: 203.432.7025 800.445.6086  
Fax: 203.432.5685  
E-mail: [development.plannedgiving@yale.edu](mailto:development.plannedgiving@yale.edu)  
[www.yale.planyourlegacy.org](http://www.yale.planyourlegacy.org)

## DOCUMENTING YOUR BEQUEST INTENTION

In order to support the educational mission of Yale University, I have included a non-contingent bequest to Yale as part of my estate plan. A copy of the relevant provision of my will, trust or beneficiary designation form is attached. If I make any change to this provision, I will notify the University of such change.

\_\_\_\_\_  
Name

\_\_\_\_\_  
Class/School Affiliation

\_\_\_\_\_  
Street, City, State, Zip

\_\_\_\_\_  
Home Telephone

\_\_\_\_\_  
Business Telephone

\_\_\_\_\_  
Current Value of Bequest

\_\_\_\_\_  
Date of Birth (for gift recognition)

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

### *Gift Recognition:*

*If you will be at least 65 years old as of June 30 of the current fiscal year, you may be eligible to receive gift recognition at a discounted value based on your age. However, if Yale will receive the non-contingent bequest upon the death of your spouse or another individual, gift recognition may be based upon his or her current age. Please provide the following information for that individual.*

\_\_\_\_\_  
*Name*

\_\_\_\_\_  
*Date of Birth*

Please submit this form to:

Yale University  
The Office of Planned Giving  
PO Box 2038  
New Haven, Connecticut 06521-2038

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