



NEBRASKA  
WESLEYAN  
UNIVERSITY

# 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 and other identifying details be used. To name Nebraska Wesleyan University in a will or trust please use the following suggested language:

### **UNRESTRICTED GIFT**

A gift that can be used where the need is greatest:

*I give, devise, and bequeath to Nebraska Wesleyan University, a nonprofit corporation located in Lincoln, Nebraska, [written dollar amount or percentage of estate] for its unrestricted use and purpose.*

### **GIFT FOR A SPECIFIC PURPOSE**

A gift that is to be used for a specific purpose:

*I give, devise, and bequeath to Nebraska Wesleyan University, a nonprofit corporation located in Lincoln, Nebraska, [written dollar amount or percentage of estate] to be used at its discretion for (insert purpose—such as a specific department or program).*

### **RESIDUARY BEQUEST**

Leaves any remainder after all other bequests have been made:

*I give, devise, and bequeath to Nebraska Wesleyan University, a nonprofit corporation located in Lincoln, Nebraska, [written dollar amount or percentage] all the rest, residue, and remainder of my estate, both real and personal, for its general purposes (or describe the specific purpose, if desired)*

## **GIFTS OF APPRECIATED SECURITIES:**

Legal Name: Nebraska Wesleyan University

Tax I.D. Number: 47-0376524

DTC Number:

Account #:

Incorporated in: Lincoln, NE

Please contact us for a stock transfer form.

**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 Brenda McCrady, JD, Director of Planned Giving.

For Gifts of Securities, please contact the Office of Gift Planning for transfer instructions.

**NOTE TO ATTORNEYS, ACCOUNTANTS AND OTHER PROFESSIONAL ADVISORS**

Thank you for helping your client with their charitable planning. The Office of Gift Planning is available to discuss with you or your client, their charitable intentions to help ensure the gift makes the desired impact. If you need information or if you have any questions or concerns, please contact Brenda McCrady, JD, at 402.465.2129 or [bmccrady@nebrwesleyan.edu](mailto:bmccrady@nebrwesleyan.edu).