



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:

Residual Bequest Language

A residual bequest comes to us after your estate expenses and specific bequests are paid:

I, [name], of [city, state, zip code], give, devise and bequeath to Rocky Mountain Children's Health Foundation, tax ID number 26-3839761, a Colorado nonprofit public benefit corporation having its principal office at 5394 Marshall St., Suite 400 Arvada, CO 80002, [written amount or percentage of the estate or description of property] to be used for the furtherance of its charitable purposes in the discretion and at the direction of its board of directors for its unrestricted use and purpose.

Specific Bequest Language

You can also name Nebraska Wesleyan University as a beneficiary of a specific amount from your estate:

I give, bequeath, and devise to Nebraska Wesleyan University of Nebraska Wesleyan University, a corporation of the State of Nebraska, located in Lincoln, NE, the sum of \$ _____, (or, ____ percent of the rest, residue and remainder of my estate) to be used to support _____ (name of program or academic area.) In the event the need to support _____ no longer exists, Nebraska Wesleyan University shall be and hereby are authorized to use this bequest for a purpose in keeping with the spirit of this gift in the best interest of the University.

Contingent Bequest Language

Nebraska Wesleyan University can be named as a contingent beneficiary in your will or personal trust if one or more of your specific bequests cannot be fulfilled:

If (insert name) is not living at the time of my demise, I give and devise to Nebraska Wesleyan University of Nebraska Wesleyan University (Tax ID #47-0376524), located in Lincoln, NE, the sum of \$ _____ (or all or a percentage of the residue of my estate) to be used for its general support (or for the support of a specific fund or program).

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 Mary Hawk, 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 Mary Hawk, at 402.465.2139 or mhawk@nebrwesleyan.edu.