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# Beneficiary Designation Instructions

*An Easy Way to Leave a Lasting Legacy*



Designating Southwestern University as a beneficiary of your retirement plan, life insurance policy, or donor-advised fund is a simple and impactful way to support our mission, without changing your will.

This type of gift often costs nothing now, avoids potential taxes for your heirs, and can be completed in just a few minutes.



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## HOW TO MAKE SOUTHWESTERN A BENEFICIARY

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### 1. Request a Beneficiary Designation Form

Contact your plan administrator, life insurance provider, or financial institution and request a “Change of Beneficiary” form. Many providers also offer this form online.

### 2. Provide Southwestern’s Information

When asked to name your beneficiary, use the following legal information:

LEGAL NAME:

Southwestern University

TAX IDENTIFICATION NUMBER (EIN):

74-1233796

ADDRESS:

Southwestern University  
Development Office  
1001 E. University Avenue  
Georgetown, TX 78626

### 3. Determine the Type of Gift

You may choose to name Southwestern as:

- A **primary beneficiary** for all or a portion of the account
- A **contingent beneficiary**, in case your primary beneficiary is no longer living

### 4. Submit the Form

Return your completed form to your provider as instructed. Keep a copy for your records.

### 5. Let Us Know (Optional but Helpful!)

If you’ve named Southwestern as a beneficiary, please let us know. We would love to thank you and welcome you into the **1840 Society**. All information you share will be kept confidential unless otherwise specified.

## Assets You Can Give by Beneficiary Designation

- **IRAs and retirement plans (401(k), 403(b), etc.)**
- **Life insurance policies**
- **Donor-advised funds**
- **Bank or brokerage accounts (via POD or TOD instructions)**



### We're Here to Help

If you have questions or would like help with the process, we're happy to assist. Your legacy matters—and your support will help future generations of Southwestern students thrive.

#### **Nicole Bolinger**

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