Sample Bequest Language

Planning Your Legacy at Southwestern University

SOUTHWESTERN UNIVERSITY



Including Southwestern University in your will or trust is a meaningful way to create a lasting legacy that supports future generations of students. Below are examples of bequest language that you and your advisor can use to include the University in your estate plans.

We encourage you to share this information with your legal or financial advisor to ensure your gift reflects your intentions.



Legal Name and Address

Please use the following legal designation in your estate documents:

LEGAL NAME: Southwestern University
TAX IDENTIFICATION NUMBER (EIN): 74-1233796
ADDRESS: 1001 E. University Avenue, Georgetown, TX 78626
TYPE OF ORGANIZATION: 501(c)(3) nonprofit educational institution

Types of Bequests

1. **General Bequest**
   Gives a specific dollar amount from your estate.

   SAMPLE LANGUAGE:
   "I give to Southwestern University, a nonprofit educational institution located in Georgetown, Texas, the sum of $ _____ for its general purposes."

2. **Specific Bequest**
   Designates a specific item or asset (e.g., real estate, stocks, artwork).

   SAMPLE LANGUAGE:
   "I give to Southwestern University, located in Georgetown, Texas, [describe the specific asset], for its general purposes."

3. **Residuary Bequest**
   Gives all or a portion of the remainder of your estate after other distributions are made.

   SAMPLE LANGUAGE:
   "I give to Southwestern University, located in Georgetown, Texas, _____% of the rest, residue, and remainder of my estate for its general purposes.

4. **Contingent Bequest**
   Takes effect only if your primary beneficiary does not survive you.

   SAMPLE LANGUAGE:
   "If [name of primary beneficiary] does not survive me, I give to Southwestern University, located in Georgetown, Texas, the sum of $ _____ (or _____ % of the residue of my estate) for its general purposes."



Designating a Purpose

If you would like to direct your bequest to a specific program, department, scholarship, or initiative, we encourage you to contact us to ensure your gift can be used as intended and appropriately honored.

Let Us Thank You

If you've included Southwestern in your estate plans, please let us know! We'd love to thank you personally and welcome you into the **1840 Society**, our legacy giving circle.

Contact Us

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This information is not intended as legal or financial advice. Please consult your advisors for guidance specific to your situation.