

## Bequest Language for Donors

### How to Include Wheaton in Your Will

The following is intended to help you and your attorney in drafting a bequest that meets your individual interests. You may make a percentage or specific bequest of cash, securities, or other property to Wheaton by designating a specific dollar amount, a particular asset, or a fixed percentage of your estate.

You may make a bequest of all or a portion of your residuary estate to Wheaton after you have provided for all other beneficiaries by specific bequests.

You may make Wheaton a contingent beneficiary of a trust that you establish in your will to provide income to one or more beneficiaries for life. Wheaton would then receive the principal of the trust at the death of the last surviving beneficiary. Such a trust arrangement may include any of the charitable life income plans outlined elsewhere in this brochure or a marital trust that pays all income to your spouse for his or her life.

### Sample Testamentary Language

**A general bequest:** “I give (a specific asset) or (\_\_\_ percent of the rest, residue, and remainder of my estate) to Wheaton College in Norton, Massachusetts, for its general use and purposes.”

**A bequest for a specific purpose:** “I give (\_\_\_\_\_ dollars) (specific asset) or (\_\_\_ percent of the rest, residue, and remainder of my estate) to Wheaton College, Norton, Massachusetts, to be used for the following purpose: (state purpose, e.g. to establish a scholarship fund, an athletic team, a library collections fund)”.

If you choose to restrict your bequest provision for the establishment of a fund for a specific purpose—such as the funding of an undergraduate scholarship—we ask that you include the following to your initial provision:

*This fund is to establish an endowment fund to be known as the (name of fund), the income from which to be used for (state purpose). If the Wheaton Board of Trustees in its sole judgment, determines that the original intent is no longer feasible, the College may use the income for such purposes as, in its sole judgment, will most nearly fulfill the original intent.*

### Note Concerning All Bequests

For purposes of legally naming the College in a bequest, the full corporate name should be used: *Wheaton College, Norton, Massachusetts*. Please contact Michelle L. Kovach, Director of Gift Planning, at 508.286.3459 or [kovach\\_michelle@wheatoncollege.edu](mailto:kovach_michelle@wheatoncollege.edu) for more information.